

An aerial photograph of a city at sunset. The sky is a mix of orange, yellow, and light blue. The city below is densely packed with buildings, roads, and green spaces. The lighting is warm, casting long shadows and highlighting the textures of the buildings and the ground. The overall scene is a mix of urban development and natural elements.

Deloitte.

Shaping Future Cities Designing Western Sydney

A blueprint for the economic transformation of Western Sydney
December 2015



Sydney's outer west: An area of enormous potential, with promising initiatives such as the proposed Western Sydney Innovation Corridor. A view from Nepean River, Penrith.





A letter from the Premier of NSW

Western Sydney is the engine room of the NSW economy. Fuelled by both major private and government investment, the region can play a key role in providing the necessary jobs, homes, services and recreational options for Sydney's growing population. *Shaping Future Cities – Designing Western Sydney* provides a blueprint for creating 200,000 great new jobs in Western Sydney by 2020.

My government's own commitment to jobs has been established. Jobs for NSW is set to drive the creation of 150,000 new jobs over the next four years. Deloitte's *Designing Western Sydney* is pushing the envelope in the context of a bigger plan for NSW to remain Australia's economic powerhouse. I am ready to work with business and community leaders to realise the vision Deloitte has helped create.

The NSW Government has already recognised the significance of Western Sydney for NSW and has invested heavily in transport and infrastructure. The largest public transport and urban road project in Australia is underway in Western Sydney – the Sydney Metro Northwest and WestConnex developments. The delivery of these and other vital transport projects in Western Sydney will enhance the productivity of Western Sydney's regional centres, reducing traffic congestion and providing improved connectivity to jobs for residents and workers for businesses.

The decision by the Commonwealth to develop the Western Sydney Airport at Badgerys Creek represents perhaps the biggest development in Western Sydney's history. In response, I commend the 400 individual contributors to this blueprint for their efforts to optimise this critical piece of infrastructure so that it will be a game changer for the region.

Development in Western Sydney is far greater than simply the investment in infrastructure. The five health and education precincts of Nepean, Westmead, Blacktown, Liverpool and Campbelltown, and the plans for better collaboration within and between them outlined in the blueprint, will produce better social and economic outcomes. These precincts will be supported by improving housing supply and affordability in Western Sydney. Land for more than 95,000 new homes has been rezoned in the Western Sydney growth centres, making it possible for more talented people to live near these important employment and innovation hubs.

As recognised by this blueprint, the diversity of Western Sydney's people remains a key strength. The young and diverse population of Western Sydney is gravitating to science, technology, engineering and maths – or STEM qualifications. It is encouraging to see that this blueprint puts in place strategies to leverage this critical resource for NSW's future prosperity.

As the Minister for Western Sydney I am proud to support this blueprint. I acknowledge the great work done and commend Deloitte for facilitating this major, collaborative, stakeholder-driven project. I look forward to working alongside Deloitte and all collaborators on the blueprint during its implementation as Western Sydney continues its success story.

A handwritten signature in black ink, which appears to read 'Mike Baird'. The signature is fluid and cursive, with a large initial 'M' and 'B'.

Hon Mike Baird
Premier of NSW
December 2015

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Executive summary

Within the space of three decades, Western Sydney has emerged as a major driver of Australia's economic growth. And with a growing population, an emerging infrastructure boom, thriving key industries and large tracts of undeveloped land, Western Sydney still offers plenty of potential for expansion.

Of course, the region faces challenges, including a lack of services and jobs, and areas of social disadvantage. But with the right policy settings, incentives and investment, Western Sydney can become an economic powerhouse that drives Greater Sydney and, indeed, Australia.

Shaping Future Cities – Designing Western Sydney was developed for this purpose, as a blueprint for change, with strategies and recommendations to help the region overcome its challenges and reach its potential.

The jobs challenge

One of Western Sydney's biggest challenges is its jobs deficit. Put simply, the region has more workers than jobs, while the opposite is true of Sydney's east. As it stands, some 300,000 Western Sydney residents leave the region each morning for work. And given Sydney's population is predicted to double over the next three decades, with the west absorbing much of that increase, the city's jobs imbalance is set to become much more pronounced.

That makes Western Sydney an increasingly vital talent pool for the rest of Sydney, but it also exacerbates the city's structural problems. Its transport infrastructure will continue to struggle to keep up with demand and longer commute times will stifle workforce productivity. People who need to work locally, such as single parents and the disadvantaged, will find it even tougher to find jobs.

Planned transport upgrades will help, but the most effective long-term solution is to fix the core problem, by creating more jobs in the west. A lot more jobs. Which is why the primary goal of *Designing Western Sydney* is to create 200,000 great new jobs by 2020.

An ambitious target

If the scale of that jobs target is ambitious, it becomes even more challenging with the inclusion of one more word: 200,000 *great* new jobs.

For Western Sydney to reach its potential, the jobs target can't be just a numbers game. It has to be about creating the types of jobs that people want, and that will convince Sydneysiders they don't have to look to the east for the best career opportunities. It has to be about creating great jobs for everyone, from professionals and knowledge workers to tradespeople and hospitality workers.

Creating 200,000 great new jobs will require nothing short of a transformation for Western Sydney. It will require changes and initiatives to attract business owners, investors and talent to the region. As the global economy transforms, Western Sydney's economy must also adapt, and fostering growth industries must become a priority.

But it's not just about getting the economic settings right; it's about making Western Sydney a great place to live and work by investing in infrastructure, recreational facilities, urban renewal programs and vibrant multicultural precincts.

Transforming Western Sydney will also require investment in the region's people. Students need to be educated and workers need to be re-skilled so both groups can take advantage of new employment opportunities. The unemployed must be given help to find jobs, alleviating the social and economic problems associated with disadvantage.

Comparative advantages

While changes have to be made, Western Sydney is starting from a position of considerable strength. It has a number of comparative advantages, including:

- A healthy economic outlook
- Integration with Australia's true global city
- Strong population growth, including a larger proportion of working age people than Australia's overall (and ageing) population
- Migrant communities with the ability to engage with business and markets abroad, particularly in Asia
- Capacity for expansion, with large areas of the region rapidly urbanising
- Over 35 billion dollars of investment in infrastructure
- Well established or growing industries in key growth sectors, including tourism, education, agribusiness, health, building and infrastructure construction.

A blueprint for change

To create 200,000 great new jobs, *Designing Western Sydney* details a range of strategies that aim to exploit these comparative advantages, while addressing the region's challenges.

It won't be easy, but we knew that even before embarking on this project. Just getting to the point of launching *Designing Western Sydney* is a significant achievement.

We knew the only way to create an effective blueprint for Western Sydney's future was to involve key stakeholders, including government, civic, industry and business leaders from a range of sectors. You can read about the process of creating this blueprint on page 11, but essentially it involved engaging with more than 400 individual stakeholders over a six-month period. The process was led by a steering committee that included some of the state's and Western Sydney's key influencers.

The end result is an ambitious blueprint that includes 25 strategies and 133 recommendations to build platforms for jobs growth, create jobs and connect people to jobs (see page 6).

Seven key drivers for creating jobs

There is no silver bullet for creating 200,000 great new jobs and all recommendations are important if this goal is to be achieved. The task of accelerating jobs creation in the region falls under seven unifying themes. These include:

1. Build better connectivity between town centres, jobs centres and residential centres by building the Western Sydney Orbital Rail line. This will link Western Sydney Airport with the North West and South West growth areas and the Sydney CBD, bringing to life the Western Sydney Innovation Corridor
2. Focus on growth sectors – particularly health, education and manufacturing – and reshape them to ensure they are deeply integrated into the global economy
3. Up-skill and educate the region for the future by providing incentives for people to choose education and training pathways that ensure they are readily employable in key growth industries
4. Improve the amenity of strategic job centres through new approaches to urban renewal, infrastructure funding and investment
5. Leverage the region's multicultural diaspora to create more and deeper connections with the world's fastest growing economies
6. Develop and drive new innovation policies that encourage start-ups and an entrepreneurial culture within the region to lift productivity and connectivity with the rest of the world
7. Lift workforce participation rates, and support disadvantaged groups through training and work transitions, creating a more balanced and equitable city.

These seven broad initiatives will be delivered via the 25 strategies summarised on the following pages.

A partnership for the future

Designing Western Sydney is more than a blueprint; it's an implementation plan that has the full support of key stakeholders.

In particular, *Designing Western Sydney* marks the start of a new partnership between the state government and regional stakeholders that includes a number of government commitments – including the adoption of the target of creating 200,000 great new jobs in the region by 2020.

But our job has only just started, and we need your assistance. We invite you to read *Designing Western Sydney* and to work with us to ensure the region reaches its full potential. With your help, Western Sydney can become a vital growth engine of Sydney and, indeed, Australia.



Danny Rezek
Office Managing Partner
Deloitte Western Sydney

The blueprint's 25 strategies

Our Design Thinking process engaged more than 400 individuals to arrive at 25 strategies set to transform Western Sydney over the next five years. This process identified three types of strategies, including;

- Platform strategies
- Creating job strategies
- Connecting job strategies

Each strategy has several recommendations that combined represent a new blueprint to create 200,000 great new jobs by 2020.

PLATFORM *strategies*

Strategies that aim to have impact that transcends the region, setting it up for success by providing the springboards for job creation. They differ from other strategies based on a particular industry or geography.



NEW APPROACHES
TO PLANNING FOR
EMPLOYMENT



GOVERNING AND
ADVOCATING FOR
WESTERN SYDNEY



OPTIMISING
WESTERN SYDNEY'S
AIRPORT (WSA)



A 40-YEAR WESTERN
SYDNEY INFRASTRUCTURE
VISION



ORIENTATE PUBLIC
TRANSPORT FROM THE
CENTRE OF SYDNEY



LEVERAGING OUR
MULTICULTURAL
DIASPORA



A WESTERN SYDNEY
INNOVATION
CORRIDOR



URBAN RENEWAL
TO PRIORITISE JOBS



CREATING
SMART CITIES



PLUS
ONE



CREATING *job strategies*

Strategies that aim to create jobs in specific industries and places where the best opportunities for investment and jobs growth are expected to occur.



HEALTH AND
EDUCATION



ADVANCED
MANUFACTURING



AGRIBUSINESS



TOURISM



ENTERPRISE
AND INNOVATION



100 MICRO
INFRASTRUCTURE
INITIATIVES



SUSTAINABLE
NEW SUBURBS



CONNECTING *job strategies*

Strategies to ensure the region's working age population has the skills, willingness and confidence to take advantage of the economic opportunities other strategies aim to create over the next five years, and beyond.



FUTURE SKILL
SHORTAGE
PLANNING



SKILLS EXCHANGES
AND DEVELOPMENT



PROMOTION OF
CAREERS DURING
SCHOOL TO WORK
TRANSITION



DEVELOP HUMAN
CAPITAL IN AREAS OF
HIGHEST DISADVANTAGE



IMPROVE LABOUR
MARKET ACCESS



BUILD
STEM SKILLS



NEW WORKER
HOUSING



INVESTMENT
IN CULTURAL
INFRASTRUCTURE



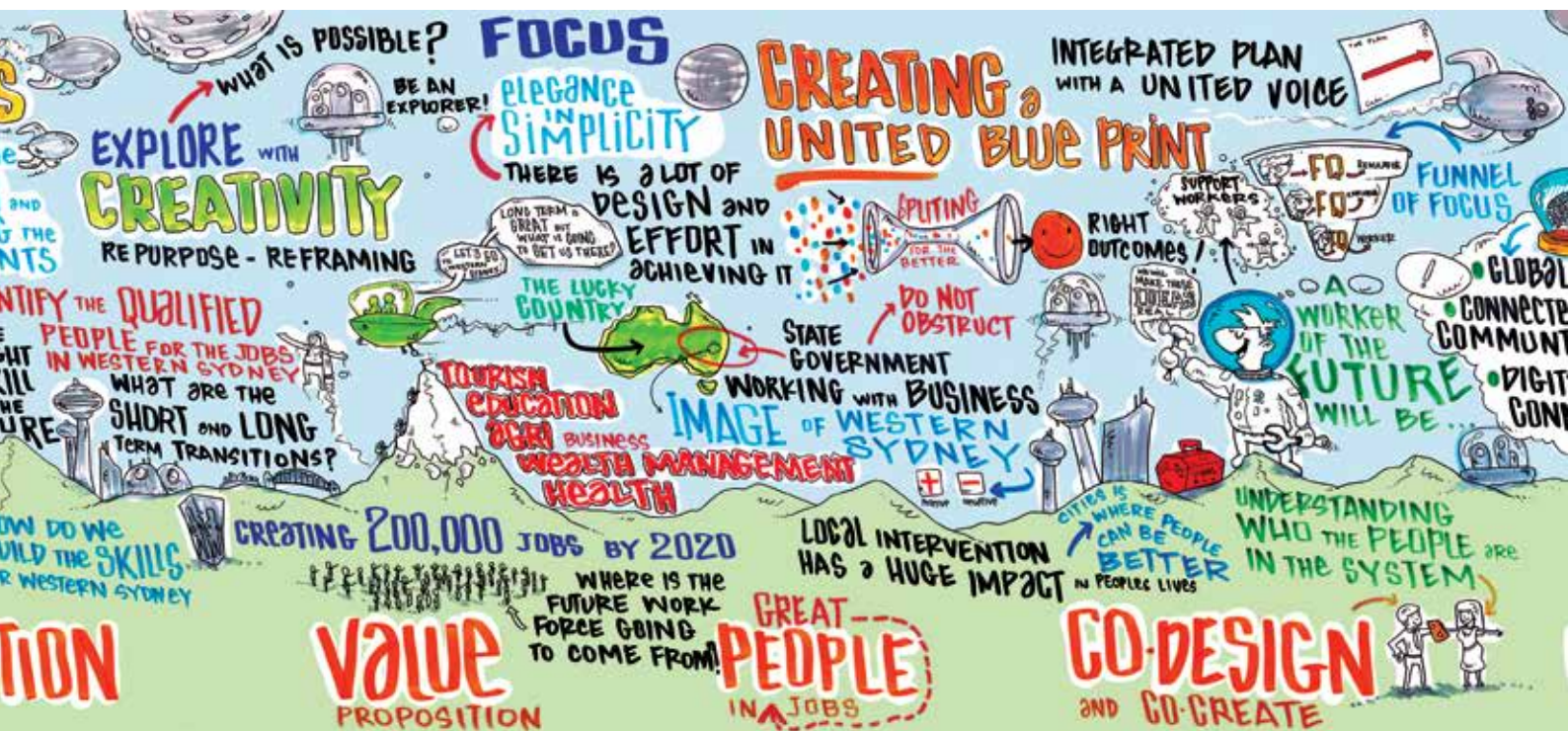
A fun process with serious intent

The process of creating *Designing Western Sydney* began in March 2015 with a workshop of public and private sector stakeholders who came together to ask one simple question: How can we create 200,000 great new jobs in Western Sydney by 2020?

This workshop identified five key questions that framed consultations with more than 400 individuals from Western Sydney over six months in preparing this new blueprint.

As such, this blueprint represents the collective ideas, aspirations and visions of a diverse and influential group of Western Sydney stakeholders.

Output from the first Design Thinking workshop, March 2015



PART I
Western Sydney,
where place is
being reconsidered



“Technology has trumped the tyranny of distance and place no longer matters. At least, that’s what most people seem to think. In fact, the opposite is occurring ...”

The purpose of place: Reconsidered, Deloitte

Place matters more than ever. “As telecommunications and travel have grown steadily cheaper, people have chosen to live closer together rather than further apart,” says Deloitte’s *Building the Lucky Country #5: The purpose of place: Reconsidered*.

The report notes that “place is becoming more important as the world’s economies are transformed by knowledge-intensive activities”.

More than that, “place matters for prosperity”. The report argues that Australia needs to reconsider the purpose of its places to unlock the potential for greater prosperity.

For Western Sydney, this means reconsidering the region’s pattern of urbanisation as it enters one of its most promising periods of growth. It also means reconsidering its approach to planning, investment, education and many other factors so that it becomes more competitive in the global economy, and attracts more knowledge workers and knowledge-based industries to provide jobs for those workers.

The purpose of place: Reconsidered identifies five types of Australian areas, two of which dominate Western Sydney: suburban and outer urban, two categories which together accommodate more than half of the nation’s population. According to the report, the challenges facing the nation’s suburban and outer urban areas include lack of access to jobs and amenities, and long journeys to work that stifle productivity and full participation in the community.

Designing Western Sydney

What better way to illustrate Deloitte’s belief in the importance of place than to facilitate a blueprint for the economic transformation of Western Sydney, one of Australia’s most promising yet, in some ways, most challenged places?

Shaping Future Cities – Designing Western Sydney provides a blueprint to help the region meet the challenges facing Australia’s suburban and outer urban areas and others that are more specific to Western Sydney. This blueprint is Deloitte’s answer to the question of how place can be reconsidered.

Traditionally, economic and infrastructure plans for Western Sydney have come from central government agencies. *Designing Western Sydney* wants to address this historical legacy with new thinking – undertaken by the leading minds in Western Sydney.

Designing Western Sydney is the result of the collective efforts of 400 individual business, government and community leaders, and other stakeholders in the region. As facilitator, we consulted with these stakeholders over several months to hear their experiences, benefit from their expertise and get their help in formulating the strategies and recommendations in this blueprint.

To do this we applied a Design Thinking approach to solving the region’s challenges. It was a lengthy process that included:

- A fact-finding workshop in March 2015 with key members of Western Sydney’s business and public sector communities at Deloitte’s Parramatta office
- A series of focus groups and four in-depth, industry-specific workshops to explore stakeholders’ ideas and experiences in more detail
- A Design Thinking workshop with key stakeholders in June 2015 to refine the ideas identified earlier
- A summit in August 2015 with key government, business and local civic leaders, including NSW Planning Minister Rob Stokes and Committee for Sydney CEO Tim Williams.

We prepared a series of discussion documents that the stakeholders debated at the various events, covering a wide range of issues and proposed initiatives for Western Sydney.

The stakeholders identified a number of Western Sydney’s defining factors that were particularly relevant in developing this blueprint. They said Western Sydney is a place:

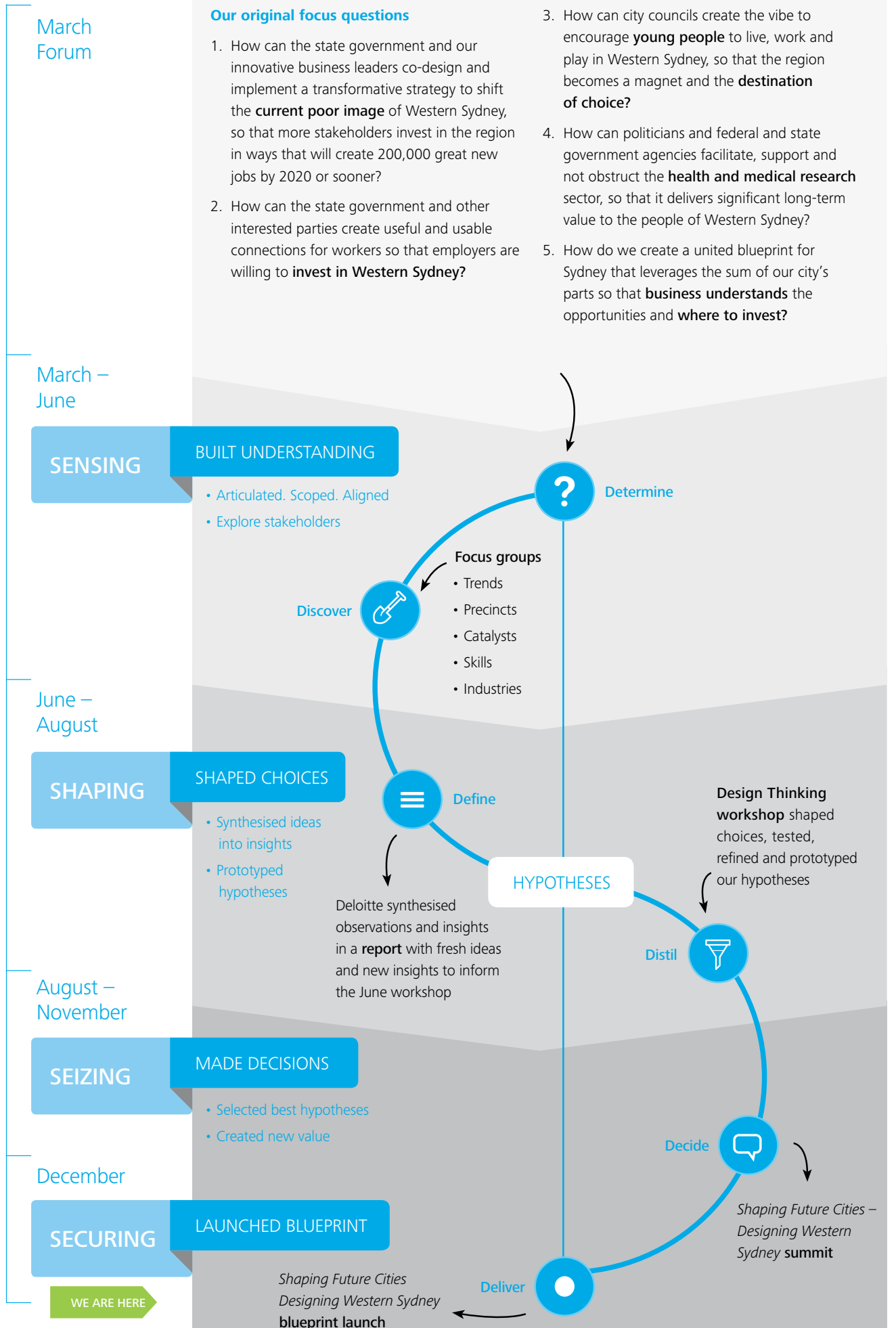
- Conscious of its urban limits
- Playing infrastructure catch-up but now home to the world’s largest infrastructure program
- Developing a new sense of place and pride
- Where creating jobs is both an economic and social imperative
- Building on its existing urban structure and economic strengths
- Ready for change but where ‘the job’s not done yet’
- That must address its social disadvantages
- Celebrating and leveraging its cultural diversity
- Where skill development and innovation must become part of its DNA.

The result is a blueprint for change that includes three suites of strategies, with recommendations to enhance the platforms for jobs growth, create jobs and connect people to jobs.

Ultimately, there was a strong consensus among stakeholders that the strategies in this report could make a major impact.

Throughout the process, the stakeholders’ unified goal was to help create 200,000 great new jobs in the region within five years.

Chart 1: How Design Thinking helped in developing the blueprint



Our original focus questions

1. How can the state government and our innovative business leaders co-design and implement a transformative strategy to shift the **current poor image** of Western Sydney, so that more stakeholders invest in the region in ways that will create 200,000 great new jobs by 2020 or sooner?
2. How can the state government and other interested parties create useful and usable connections for workers so that employers are willing to **invest in Western Sydney**?
3. How can city councils create the vibe to encourage **young people** to live, work and play in Western Sydney, so that the region becomes a magnet and the **destination of choice**?
4. How can politicians and federal and state government agencies facilitate, support and not obstruct the **health and medical research** sector, so that it delivers significant long-term value to the people of Western Sydney?
5. How do we create a united blueprint for Sydney that leverages the sum of our city's parts so that **business understands** the opportunities and **where to invest**?

Western Sydney

\$35 billion
Total infrastructure
pipeline

\$1.68 billion
To redevelop
Westmead,
Blacktown and
Mt Druitt hospitals

\$3.6 billion
For planned Roads
Infrastructure

664,000
new homes
needed by 2031

\$5.3 billion
Investment for
Western Sydney
Airport (dual
runway option)

8,841 sq km
44% National Park

Bells line of road

Main western railway

Penrith

Liverpool

Campbelltown

Western Sydney Innovation Corridor

Main southern railway

12

11

5

1

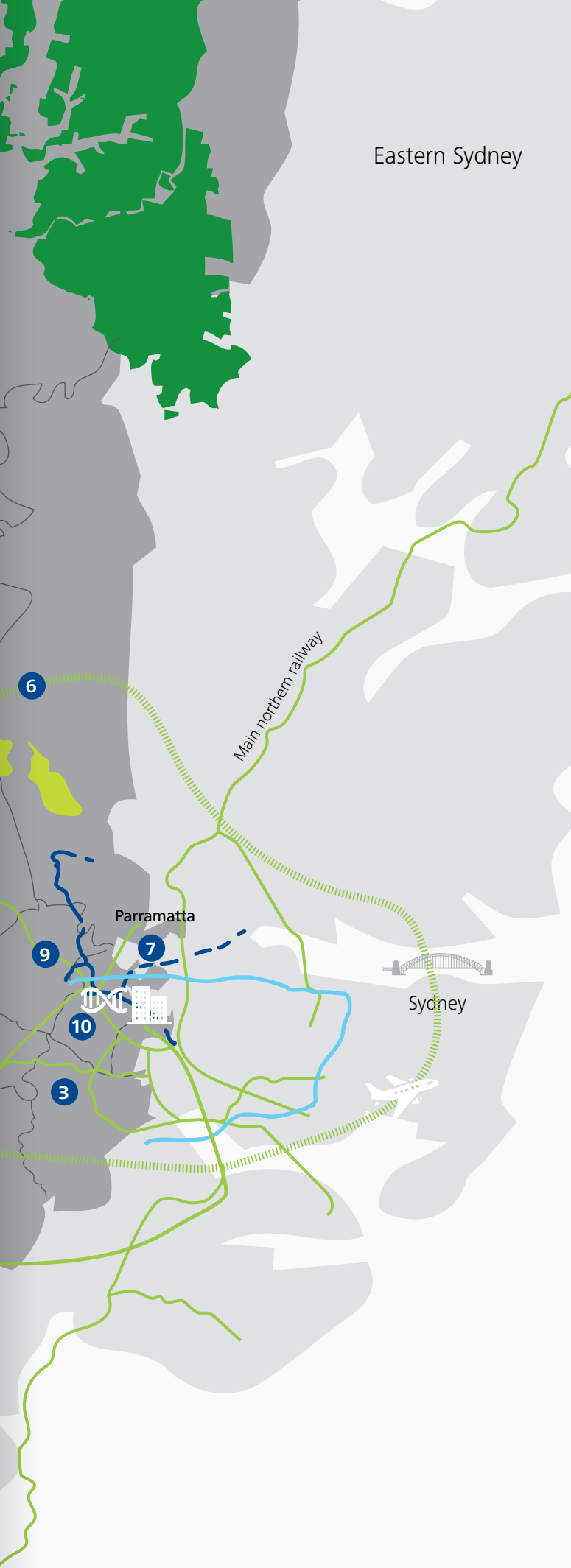
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4

14

13

8

















Eastern Sydney

Population forecasts by LGA

	2011	2021	2031
1 Blacktown	312,350	388,050	473,300
2 Fairfield	196,500	217,900	239,900
3 Bankstown	190,850	214,750	240,800
4 Liverpool	188,100	236,950	288,950
5 Penrith	184,600	223,900	261,450
6 The Hills	177,000	227,900	280,900
7 Parramatta	174,800	211,400	253,900
8 Campbelltown	151,150	186,750	215,750
9 Holroyd	104,100	120,600	136,000
10 Auburn	77,800	104,150	130,600
11 Blue Mountains	78,550	86,950	97,300
12 Hawkesbury	64,350	71,750	80,650
13 Camden	58,450	107,700	162,350
14 Wollondilly	44,600	50,800	57,700

Key

-  Health and education precincts
-  Regional cities
-  Western Sydney Airport
-  Sydney Kingsford Smith Airport
-  Current railways
-  Proposed railways
-  Light rail
-  Western Sydney Innovation Corridor
-  Penrith Lakes
-  North West Growth Centre
-  Western Sydney Employment Area
-  South West Growth Centre
-  National park
-  Road upgrades and construction





The urgency for more jobs

“There is an increasing disconnect between the resident labour force and the jobs available within the region. This means more workers in industry sectors key for growth will leave Western Sydney for elsewhere in the metropolitan area”.

The Centre for Western Sydney, 2015

Liverpool: one of Western Sydney’s thriving health precincts that, with further initiatives, can become a centre of strong growth and innovation.

Where our workers travel

Shaping Future Cities – Designing Western Sydney was born out of a paradox. Deloitte observed that while Western Sydney has a magnificent economic outlook in terms of growth, the region also has persistent challenges.

Some of these challenges include lack of access to infrastructure, services and jobs, and areas of social disadvantage. Unless something is done soon, many believe these problems may get worse.

Critical among these issues is the region's worsening jobs deficit. According to state government figures, 300,000 Western Sydney residents leave while 100,000 workers arrive in the region each morning for work. In other words, Western Sydney has a jobs deficit of 200,000.

By 2041, the NSW Bureau of Transport forecasts¹ that more than 440,000 residents will leave the region each morning for work, unless action is taken.

Further, according to government forecasts, the region's jobs deficit could grow from 200,000 to more than 340,000 by 2041. Over the same period, Eastern Sydney is forecast to increase its jobs surplus to more than 280,000.

Chart 2: Western Sydney daily worker flows (2016)

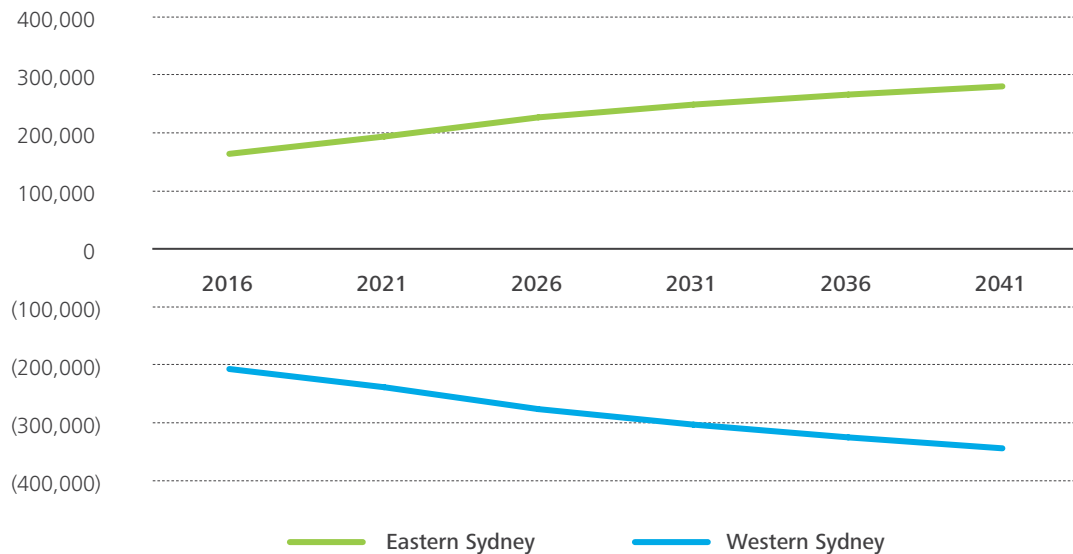


Source: NSW Bureau of Transport Statistics

¹ NSW Bureau of Transport Statistics.

Our worsening deficit

Chart 3: Sydney's forecast jobs deficits and surpluses



Source: NSW Bureau of Transport Statistics, Deloitte Access Economics

Even more critical is Western Sydney's comparative weakness in high-value jobs in sectors like professional and business services, which have been driving Sydney's economic growth. These jobs remain concentrated in the east.

200,000 jobs, seriously?

Our target of creating 200,000 great new jobs in Western Sydney by 2020 is ambitious. To put it into perspective, Western Sydney gained around 100,000 additional jobs between 2006 and 2011.

Purely by maintaining this historical rate of net jobs growth in a slightly larger economy, Western Sydney is likely to benefit from 110,000–120,000 additional jobs over the next five years. By combining that forecast with employment stimulated from planned infrastructure programs, Western Sydney could be reasonably expected to gain between 120,000 and 130,000 new jobs by 2020.

So, the challenge of *Designing Western Sydney* is to create 70,000–80,000 jobs in addition to the expected job increases in a business-as-usual scenario.

Who will create the jobs?

While feedback from stakeholders regularly identified the role of government in delivering jobs in Western Sydney, the roles of individuals, communities, businesses and industries were also widely discussed.

Don't we already have a jobs target?

Announced in August 2015, the Jobs for NSW fund will provide \$190 million over four years to grow jobs across NSW. This fund is being directed to areas where it will have the biggest economic impact. It's estimated that this fund could support the creation of up to 150,000 jobs in NSW by 2019.

Rather than directly funding job creation, *Designing Western Sydney* aims to facilitate a range of strategies to create 200,000 jobs in the region by 2020. Nevertheless, government-led initiatives like Jobs for NSW will be important in growing the number of jobs in Western Sydney.

Western Sydney, a work in progress

"A city is never completed. It has a beginning but it has no end. It's a work in progress, always waiting for new characters to move in."

Bjarke Ingels, Future of Story Telling 2014

Badgerys Creek, the home of Sydney's next major airport. It could be a game changer for Western Sydney, but measures should be taken now to set up the region for economic advantage.





Western Sydney, the great urban experiment

Western Sydney has long had a strong influence over the rest of Sydney and indeed Australia. The Traditional Custodians of much of the region, the Dharug aboriginal people, left a lasting cultural and linguistic legacy with words such as boomerang, corroboree, dingo, koala, kookaburra, wallaby and coo-ee.² They also assisted in early British explorations of the Hawkesbury and Nepean areas, providing navigation and hunting expertise.³

Aside from the cultural legacy, Western Sydney has since 1788 been vital to the nation's prosperity and growth. With the nascent colony at Sydney Cove facing food crisis, Parramatta was quickly established as Sydney's food bowl. More than that, it became a centre of innovation. It was at Parramatta, in 1789 on his 'Experiment Farm', that James Ruse became the first person in Australia to successfully grow grain – and where John Macarthur pioneered the nation's wool industry in the 1790s.

Yet, while Sydney has since transformed into one of the world's great cities, Western Sydney's contribution has become even more important. The region has always accommodated the bulk of greater Sydney's population growth, and today supplies a large proportion of the city's workforce. In fact, a third of the region's workers commute to other areas of Sydney.

Given that Sydney's population is forecast to double to 8 million by 2055, this role will become even more vital. However, the region can and should be much more than a labour supply line to the rest of Sydney. As we detail in this blueprint, Western Sydney has many comparative advantages and exciting opportunities that need to be harnessed.

With the right policy settings, incentives and infrastructure investment, Western Sydney can become an epicentre for jobs in its own right, and an economic powerhouse driving Greater Sydney and NSW.



Eagle Reach Cave is part of a network of aboriginal sites across Wollemi National Park.

But it won't be easy. To succeed in this ambition, Western Sydney policy makers, business leaders and workers must tap into the region's pioneering spirit and embrace its roots in innovation.

New approaches, original ideas and a renewed sense of place are needed.

Rapid urbanisation

Following World War II, vast tracts of land in Western Sydney were set aside for housing construction to accommodate the baby boom families and waves of migrants. The region absorbed large numbers of Sydneysiders migrating from crowded inner-city neighbourhoods, people from rural areas, and Europeans and Britons seeking a new life far from war-torn Europe.

During this early post-war expansion Sydney first experimented with innovative models of metropolitan governance by establishing the Cumberland County Council. In 1951, the council gazetted the County of Cumberland Planning Scheme, which was described as "the most definitive expression of a public policy on the form and content of an Australian metropolitan area ever attempted".

One striking feature of the Cumberland Plan was a vast green belt to hem in the city's sprawl and encourage development in outer cities. However, the scheme ultimately faltered when state government agencies, local councils and developers all grew nervous about the Cumberland Council's powers – lodging 22,000 claims against it for 'injurious affectation' arising from county zoning.

Though the initiative was eventually dropped, the Cumberland Plan is an example of the type of innovative thinking that's required for Western Sydney's future prosperity.

The post-Baby Boomer boom

Despite these initiatives, for decades Western Sydney's infrastructure and services lagged well behind the needs of the burgeoning population. Even in the 1970s, basics like sewerage were still missing from the western suburbs. The region's road and public transport networks expanded but were still generally inadequate. Westmead Hospital was established in 1978 but otherwise key health and education services were concentrated kilometres away in eastern Sydney.

Meanwhile, large-scale immigration continued, with suburbs like Cabramatta and Punchbowl absorbing people displaced by conflicts in Indochina and later Latin America, the Middle East and Sudan.

² The NSW Office of Environment and Heritage 2011, Sydney Basin – regional history, www.environment.nsw.gov.au/bioregions/SydneyBasin-RegionalHistory.htm.

³ Watkin, T 1793, A Complete Account of the Settlement at Port Jackson - Including An Accurate Description of the Situation of the Colony; of the Natives; and Of Its Natural Productions, G. Nicol and J. Sewell, London.

The Western Sydney Regional Organisation of Councils was launched in 1973 to advocate on behalf of the region's needs. However, it wasn't until the 1980s and 1990s that advances in the region's services and infrastructure gathered momentum. Landmark initiatives included the establishment of the University of Western Sydney (recently renamed Western Sydney University). A 'beds to the west' campaign succeeded in having small district hospitals upsized to teaching hospitals.

New motorways and railway lines were opened. Continuing residential and industrial land releases provided more homes and jobs, and from this growth Parramatta, Campbelltown, Penrith and Liverpool emerged as regional centres of significance.

The region benefitted from some of Australia's largest industrial land releases at places such as Dunheved, Eastern Creek, Wetherill Park, Blacktown and Smithfield. By the 1990s the region saw its first US-style business park emerge at Norwest.

A new millennium

Western Sydney's growing sense of identity blossomed into confidence when the region built the facilities for and successfully hosted the Olympic Games in 2000.

Since then, the region has seen more growth and investment, including the completion of the M2, M5 and M7 motorways, the establishment of Western Sydney Parklands and the opening of Western Sydney University Medical School at Campbelltown. Much more needs to be done, as shown by the recent launch of the 'Fair Go for Western Sydney' campaign for more government investment in the region.

However, there are plenty of reasons for optimism. In 2014, after decades of debate, the federal government finally confirmed Badgerys Creek as the site of Sydney's second airport.

This single project can turbocharge the region's economy, but other significant initiatives are underway too. These include the WestConnex and NorthConnex motorway programs, the Sydney Metro North West and South West Rail Link, and a number of urban renewal programs.



Parramatta, panoramic view of township from Parramatta Park, ca. 1910s. Courtesy of Parramatta Heritage Centre.

A history of metropolitan and local economic planning

Designing Western Sydney is by no means the first effort at shaping a better future for Western Sydney. The region has a long history of urban and metropolitan planning that has supported the delivery of housing, jobs, infrastructure and services. These include:

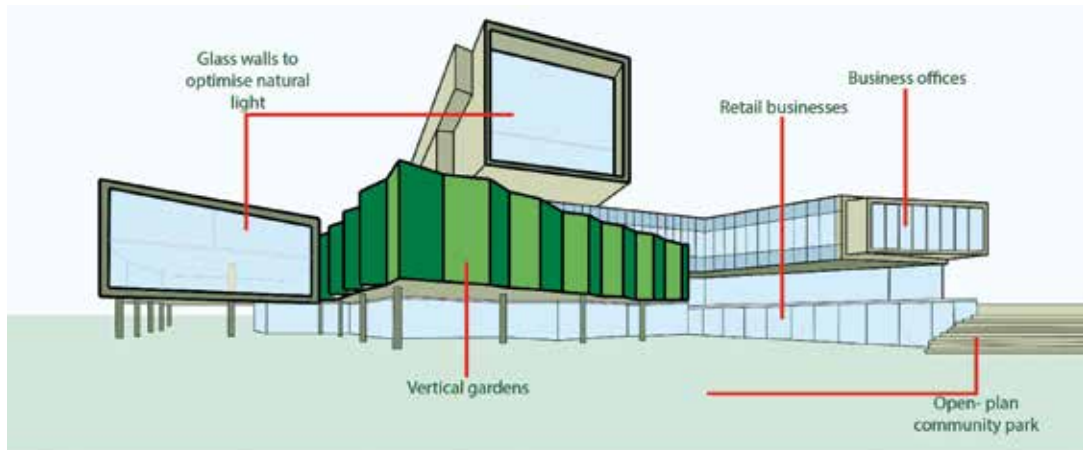
- The establishment of the State Planning Authority in 1963 and the release of the Sydney Region Outline Plan in 1968 that broadly established an urban framework for Sydney
- The release of Sydney into its Third Century in 1988 by the Department of Planning, followed by *Cities for the 21st Century*, in the mid-1990s
- The 1999 gazettal of SEPP No. 59, designating 700 hectares of employment land in Western Sydney, followed by the Western Sydney Employment Lands Investigation Area that included 10,000 hectares for employment purposes
- The 2005 *City of Cities Sydney Metropolitan Plan*
- The 2012 NSW Long Term Transport Master Plan and State Infrastructure Strategy
- The state government's *A Plan for Growing Sydney (2014)* that now devotes a chapter to Western Sydney.

In addition, there have been a number of local community economic development initiatives, including:

- The state government's *The Western Sydney Economic Development Strategy*, in 1987
- The first economic development strategies of Parramatta, Penrith and Liverpool city councils (mid-1990s) and Blacktown City Council (2002)
- The Western Sydney University's *North-West and West-Central Sydney Employment Strategies*, in 2008.

Visions of 2020

Western Sydney Eco-hub – by Chelsea Schofield



What might Western Sydney be like in 2020? We asked Western Sydney University design students to tell us what they thought the region would need to look like if we are to create 200,000 great new jobs. Here are a few of the next generation of workers' visions for 2020.

Penrith Lakes to become a new hub for business

By 2020, construction will have started on a new business district in the Penrith Lakes area. With all buildings using recycled and environmentally sustainable materials, it will be an eco-hub that attracts global businesses and provides jobs for many professionals and skilled workers.

Qualify Coin – by John Herring



Individuals trading skills with each other – and up-skilling Western Sydney

By 2020, Qualify will be a thriving online service that enables Western Sydney workers to trade skills. By joining www.qualify.com, a member will be able to select from a vast array of skills and the service will pair them with a member already qualified in that skill. The first member will purchase the training with a 'Qualify Coin'. By helping each other up-skill, they will help Western Sydney's workforce become more attractive to employers, creating new job opportunities.

Tribe Hive, Creative Western Sydney – by Cara Kennett-Tribe



Space for creative industries to drive innovation

By 2020, Penrith will be transformed into an innovative hub supporting the creative industry through partnerships with community and education organisations such as Western Sydney University. These organisations will provide free or subsidised events, buildings and underutilised spaces to run exhibits and seminars, enabling creatives to innovate, and creative industries to flourish.

A history of events that have shaped Western Sydney

POST WWII

- **1946**
Construction begins on Warragamba Dam.
- **1949**
Villawood Migrant Hostel opens to displaced people after WWII.
- **1950**
Cabramatta's 'migrant hostel' is constructed to house post-war immigrants fleeing Europe. By 1959 over 900 migrants are living in the hostel.
- **1951**
Sydney's first metropolitan planning scheme, the County of Cumberland Planning Scheme is gazetted and the Cumberland County Council is charged with implementing the Scheme.
- **1957**
The original Scenic Skyway is installed at Katoomba in the Blue Mountains.

1960s 1970s

- **1960s**
NSW Government Architect Phillip Cox recommends building large-scale public housing estates in Western Sydney – the first 6,000 at Green Valley, then 8,000 at Mt Druitt – following the US-styled Radburn model. By the 1970s, these estates represent some of the most disadvantaged suburbs in Australia.
- **1960**
Construction of Warragamba Dam finishes.
- **1963**
Cumberland County dissolved, the State Planning Authority was established; Camden line closed.
- **1968**
Sydney Region Outline Plan released.
- **1971**
The first stage of the new western freeway (M4) opens from Prospect to Regentsville.
- **1973**
South Western Freeway opens; Galston is selected as the site for Sydney's second airport; New Cities proposal for Campbelltown, Camden and Appin as south-west urban corridor, to be co-ordinated by Macarthur Development Board; "Beds for the West" campaign begins with establishment of Western Metropolitan Health Region.
- **1974**
Commencement of national Sewerage Program; first Australian Grand Prix held at Oran Park.
- **1975**
Westfield complex opens in Parramatta, at the time the largest shopping complex in the Southern Hemisphere.
- **1977**
Granville Rail Disaster kills 83 people and injures more than 210.
- **1978**
Westmead Hospital opens; first residents of Claymore Housing Estate move in.
- **1979**
Bushfires burn out of control in December, resulting in five deaths and 48 houses damaged or destroyed.



**1980s
1990s**

- **1982**
Conversion of Casula Powerhouse into an arts centre; the state government approves development application for the Penrith Lakes scheme to commence a large-scale mining operation in Penrith.
- **1983**
Land set aside at Homebush Bay for park – completed as Bicentennial Park in 1988.
- **1985**
Australia's Wonderland opens.
- **1986**
Badgerys Creek Airport first proposed.
- **1988**
Opening of the East Hills Rail Line; Bicentennial Park, Homebush Bay and Mount Annan Botanic Garden in Macarthur open to the public; Riverside Theatre opens in Parramatta.
- **1989**
University of Western Sydney opens; Liverpool Hospital assumes teaching hospital status; Mt Tomah gardens open.
- **1990**
Nepean Hospital assumes teaching hospital status; first race at Eastern Creek Raceway.
- **1992**
M2 Hills Motorways opens; M5 South West Opens.
- **1993**
Rivercat service along the Parramatta River starts.
- **1994**
Four people die and 200 homes are destroyed when fires envelop the northern, southern and western outskirts of Sydney; Wollemi Pine discovered in Western Sydney, the most significant botanical discovery of the 20th century.
- **1997**
The "Class we failed" article appears in *The Daily Telegraph*, shaming Western Sydney's education system.

2000s

- **2000**
Sydney Olympics declared 'best Olympic Games ever'; Greater Blue Mountains World Heritage Listing inscribed.
- **2001**
M5 East Motorway opens.
- **2001**
Black Christmas bushfires destroy 30 homes and businesses across the Macarthur area.
- **2003**
Eagle's Reach indigenous cultural site rediscovered.
- **2004**
Australia's Wonderland site rezoned.
- **2005**
M7 Motorway opens; Macquarie Fields riots.
- **2006**
Western Sydney Parklands established.
- **2007**
UWS Clinical School at Campbelltown Hospital opens.
- **2008**
UWS Medical School opens.
- **2009**
GWS Giants founded.
- **2012**
Western Sydney Wanderers FC founded.
- **2013**
Blue Mountains bushfires considered the worst in over 60 years, destroying 248 homes.
- **2014**
Federal government announces Western Sydney Airport, providing \$3.6 billion roads package.
- **2015**
'Struggle Street' airs on SBS; *Shaping Future Cities – Designing Western Sydney* launched.

Why Western Sydney matters

Western Sydney represents 10% of Australia's population and accounts for 8% of its gross domestic product. Aside from being a significant population and economic growth centre, the region plays two distinctive roles in shaping the future of Sydney and Australia.

The Australian context

The Australian economy is in transition. As the resources boom dissipates, the nation needs to find other economic opportunities.

The current shift in the global economy towards Asia can profoundly help Australia with this task. As incomes in Asia rise, consumption patterns will continue to shift towards higher-value goods and services. The rise in the Asian middle class will drive global consumer markets and lead to new economic opportunities for Australia.

Western Sydney is well positioned to take advantage of these opportunities and in doing so play a lead role in the integration of the Australian economy into the Asian and global economy.

There are several reasons to be optimistic about this. First, with more than 300,000 residents born in Asia, the region has extensive family-based cultural connections with Asia.

Secondly, with Australia's largest manufacturing sector located in Western Sydney, the region has the capacity to produce and distribute goods that a growing Asian middle class will demand – not commoditised, low-value products, but innovative, value-added goods and services. The region can produce, process and deliver the food demanded by the growing Asian market too.

Third, Western Sydney has a large and increasingly skilled working age population, and world-class education institutions to help the workforce adapt and fully harness the opportunities on Australia's doorstep.

The region is already globally competitive in a number of sectors. However, other regions overseas with similar strengths to Western Sydney are becoming competitive too. Western Sydney will need to harness its abundance of land and labour resources, and hone its ability to innovate, if it is to convert these opportunities into lasting prosperity.

The global city context

These competitive advantages make Western Sydney vital to the continued growth and success of Australia's global city. Of particular importance to the rest of Sydney is the region's large and highly skilled labour market.

For example, Western Sydney has three of the top 10 Sydney local government areas, ranked by the number of resident professional service workers: The Hills Shire, Blacktown and Parramatta.

Western Sydney can, through the development of its labour market, accelerate the benefits of economic agglomeration that drive the evolution of Australia's global city. As Deloitte's *The purpose of place: Reconsidered* says: "Agglomeration spurs innovation because it catalyses the creative interaction of diverse groups of people, especially knowledge workers".

As well as its labour markets, Western Sydney has many under-developed areas that, with the right policies and investments, will be vital in fuelling Sydney's long-term growth.

Why act now?

With one million more people expected to live west of Homebush by 2031, Western Sydney's population will grow by almost 50% in just over 15 years. However, most *Designing Western Sydney* workshops and focus groups drew attention to problems related to this growth, and the potential missed opportunities if the region's stakeholders are not prepared to respond decisively.

Missed economic opportunity

Western Sydney's economy will continue to grow even without intervention. However, lifting the region's growth and productivity even slightly above current projections represents a major economic opportunity for the region – and Australia – in terms of output and new jobs.

Interventions from *Designing Western Sydney* have the potential to lift current forecasts above a business-as-usual scenario.

Labour market interventions that can access the region's latent pool of working age residents through improvements in participation or education will yield significant economic opportunity that few other places in Australia can offer.

Given the socio-economic profile of Western Sydney, creating additional jobs across all sectors will not only help the region's unemployed and disadvantaged, but it will also deliver dramatic economic benefits to the region. We have modelled some of these potential benefits in the 'Unleashing Western Sydney's economic potential' section on pages 88-92.

Things could get worse

Perhaps the biggest challenge facing the region is changing the status quo. If things stay the same, the region's problems will get worse and the challenges harder to overcome.

More than that, Western Sydney may miss huge opportunities in key sectors such as health, education, tourism and professional services. It may miss the opportunity to correct the city's imbalances in jobs and income to give disadvantaged households a greater chance of escaping the poverty trap and improving the whole region's prosperity.

Change that makes a real difference to the region won't be easy. It will require multiple actions from many stakeholders over a sustained period. However, the alternative is an increasing jobs deficit, greater congestion and increasing inequality.

The alternatives aren't sustainable

Perhaps the most obvious reason that action is required is the effect on Sydney's transport networks if more jobs aren't created in Western Sydney.

By 2021, 52% of Sydney's population growth is forecast to be in Western Sydney, with only 38% of jobs in the region. This trend is expected to continue beyond 2021, unless action is taken now.

Official projections also indicate that by 2041, 140,000 more commuters will be using the region's already congested transport links to the city. To meet this demand, Deloitte Access Economics analysis reveals that Western Sydney would need 19 new freeways, six new train lines or 1,700 more buses – all linking Sydney's growing population centres in the west with job centres in the east.

Investing in transport infrastructure will help but it won't solve the problem. The solution is to address the fundamental imbalance in Sydney's jobs market by creating more great jobs at sufficient density in Western Sydney.

Australia's growth engine: Opportunities and challenges

"More than anywhere else in the nation, Western Sydney will drive national prosperity over the next 50 years because what is taking place here has unrivalled speed, scale and connectivity."
Western Sydney Regional Organisation of Councils Prospectus Framework, 2015

Penrith: One of the region's fastest growing areas and central component to the proposed Western Sydney Innovation Corridor.





Western Sydney is one of the world's standout urban success stories

DEMOGRAPHICS

- 1.8%** annual population growth
- 1 in 10** Australians
- 1 in 20** Indigenous Australians
- 3 in 10** NSW residents
- 830,000** residents aged under 30
- 2.98** residents per household
- 35%** born overseas
- 1 in 2** without a tertiary qualification
- 2.2 million** residents
- 39%** of people speak a language other than English at home

PEOPLE

- 1 million** more residents by 2031
- 52%** of Sydney's population growth until 2031
- 28%** more workers than jobs available
- 2** new urban release areas the size of Canberra
- 4** regional cities
- 7,000** school aged residents in Western Sydney
- 8/10** of Sydney's most disadvantaged LGAs
- #1** prevalence of diabetes amongst Australians

INDUSTRY

- 3rd** largest economy in Australia
- 13** strategic centres
- 823k** workers
- 630k** jobs
- 10,000 ha** employment area
- \$127 billion** Economy
- 37%** of all new jobs in Sydney will be created in Western Sydney
- #1** Health and education represent the largest single industry employer in the region
- 5** health and education precincts

INFRASTRUCTURE

- 1** new airport
- \$35b** worth of major projects in the pipeline
- 18.3** years: average age of cultural arts institutions
- 1** new light rail line
- 1** new metro rail
- 2** new heavy rail lines
- 9** regional cultural arts facilities
- 1** new lake on the scale of Sydney Harbour
- 90+** storeys: Australia's tallest building proposed
- 27km** of Western Sydney Parklands

The region has significant comparative advantages and exciting opportunities, including a large and growing workforce, multicultural global connections, a strong presence in growth industries and integration with the rest of Sydney's global economy.

These advantages are set within one of Australia's strongest growth economies – growth that is being supported by a range of infrastructure investments in areas such as transport, culture and sport.

However, it also faces some profound challenges – not least of which is a legacy of inaction by governments and locals alike. Challenges with pockets of extreme social disadvantage, access to housing and public transport, not to mention access to quality employment, have come to characterise the region.

Here we examine some of those challenges and opportunities in more detail.

Australia is grappling with some demons, and doing so pretty successfully. But most of those demons on the national landscape are rather less of a problem for New South Wales, with the Premier State leading the rest of the states in terms of demand growth over the past year.

Deloitte Access Economics

Macroeconomic outlook

Underpinning Western Sydney's opportunities in the future will be a generally healthy national economy, albeit less buoyant than during recent boom conditions. Deloitte Access Economics forecasts that growth in Australia's gross domestic product (GDP) will average 2.7% per annum over the next five years.

In addition, the challenges facing other state economies are less pronounced in NSW. Buoyed by low interest rates, housing investment, population growth and a weaker Australian dollar, NSW is expected to improve its economic standing in the coming decade. In 2014, NSW enjoyed relatively buoyant growth of 3.1%, a considerable improvement on the 1.1% growth of a year earlier. Over the next decade, NSW gross state product per capita – a key measure of state income – is expected to increase by 30%.

With interest rates and the Australian dollar predicted to remain low, opportunities are expected to emerge in sectors that are sensitive to these two economic levers, including manufacturing, tourism, construction and retail. These sectors are the traditional strengths of Western Sydney.

Other traditionally strong sectors in the region, including transport, logistics, wholesale trade and utilities will benefit from major infrastructure projects and the 664,000 new homes that will need to be built in Western Sydney by 2031.

Integration with Australia's global city

Western Sydney is the physical and demographic centre of Sydney, one of the top-ranked global cities. The relationship between Sydney's west and the rest of the city opens up more opportunities, scope for growth and significant advantages over many other regions around the world.

Sydney is often viewed as a city divided between east and west, but this divide is as much a social and cultural perception as it is a material one. In fact, the west is very much part of a metropolis that ranks in the top 10 globally integrated cities, comparable to Hong Kong, Paris, Singapore, Shanghai, Tokyo and Beijing.⁴

Sydney is home to the Asia-Pacific regional headquarters of more than 600 multinationals⁵ and 93% of the international financial institutions trading in Australia.⁶ It attracts more than 30 million tourists a year⁷ and is the world's most popular city among international university students.⁸

Of course, it's not perfect. Sydney has fundamental problems with "gaps in infrastructure and the innovation system", according to British urbanist Greg Clark.⁹ Nevertheless, it has "superb assets and a wonderful opportunity to combine corporate success with liveability success".

Western Sydney will play an important role in Greater Sydney's future success, but integration will be the key. What's good for the city's west will be good for the east, and what improves the east will assist the west. The east needs the west for its population and development potential, and the west needs the east for its access to international markets and recognition.

Although Western Sydney deserves its fair share of government investment, and respect for what it contributes to the city, the region needs to leave behind the legacy of 'us and them' or any suggestion that the region is perceived as Sydney's 'poor cousin'.

Only as an integrated entity will Western Sydney benefit from the full effects of urban agglomeration and become more competitive in the global battle among cities to attract talent, businesses and investment.

⁴ GaWC n.d., The World According to GaWC 2012, www.lboro.ac.uk/gawc/world2012.html.

⁵ Department of Industry n.d., Live & Work in New South Wales, www.industry.nsw.gov.au/live-and-work-in-nsw/working-in-nsw/places-to-live-and-work/sydney.

⁶ Department of Industry n.d., Business & Industry in New South Wales, www.industry.nsw.gov.au/business-and-industry-in-nsw/nsw-business-environment/trade-and-investment/banks.

⁷ Destination NSW 2015, Travel to Sydney – Year ended June 2015, www.destinationnsw.com.au/wp-content/uploads/2014/04/Sydney-YE-Jun-15.pdf.

⁸ Kearney, AT 2014, Global Cities, Present and Future, www.atkearney.com/documents/10192/4461492/Global+Cities+Present+and+Future-GCI+2014.pdf/3628fd7d-70be-41bf-99d6-4c8eaf984cd5.

⁹ The Committee for Sydney 2014, Sydney not yet a true global city, www.sydney.org.au/sydney-not-yet-a-true-global-city/.

Population growth

Western Sydney is the site of Australia's most significant urban growth. In the next 25 years, the region will account for 60% of Sydney's and 15% of the nation's population growth. Urban growth of this magnitude is now a rarity in the cities of advanced nations.

Western Sydney is big and growing fast. Already, it is home to over 45% of all Sydney residents, a large number of whom are of working age. Furthermore, the region is expected to grow substantially faster than other areas of Sydney, offering much greater potential for economic expansion.

Today, an estimated 2.2 million people live in the region, spread across 14 local government areas (LGAs), according to the Australian Bureau of Statistics (ABS).

Between 2006 and 2011 alone, Western Sydney's population grew by 7.5%, compared to the overall NSW growth rate of only 5.6%. The region includes five of the state's 10 fastest growing LGAs: Camden, Auburn, Parramatta, Blacktown and Holroyd.

The region's population growth is expected to continue and by 2036 its population is forecast to be nearly 3 million. Nearly one in 10 Australians calls Western Sydney home. And of the top 10 local councils contributing to Sydney's future growth, nine will be in Western Sydney, with the top five including Blacktown, Camden, Liverpool and the Hills Shire.¹⁰

Population growth is good for business, increasing the size of markets and providing a ready supply of workers. It allows business to thrive and expand, and provides good conditions for start-ups and new business opportunities. Ultimately, that means greater prosperity for the region.

Yet the region still has plenty of open spaces – less than 60% of the region's almost 9,000 square kilometres is urbanised. A large proportion of Western Sydney encompasses the World Heritage-listed Greater Blue Mountains National Park.

Growing working age population

Western Sydney is home to the nation's largest and most diversified workforce.

Not only is the region's population growing, it's also relatively young. With more than one in two people under the age of 35, and more than one in three under 24, the region has a large working age population. Over two-thirds of the population is of working age, between the ages of 15 and 64.

Nationally, our population is ageing. With the number of people aged over 65 projected to double by 2055,¹¹ governments are being squeezed by downward pressure on tax revenues and upward pressures on service costs such as healthcare and aged services. Regions with large, younger workforces like Western Sydney will therefore become even more important to the nation as it grapples with the challenges of an ageing population.

Workforce skills

Western Sydney has one of Australia's fastest growing professional labour markets. Moreover, there is rapid growth in the number of new graduates eager to find local employment.

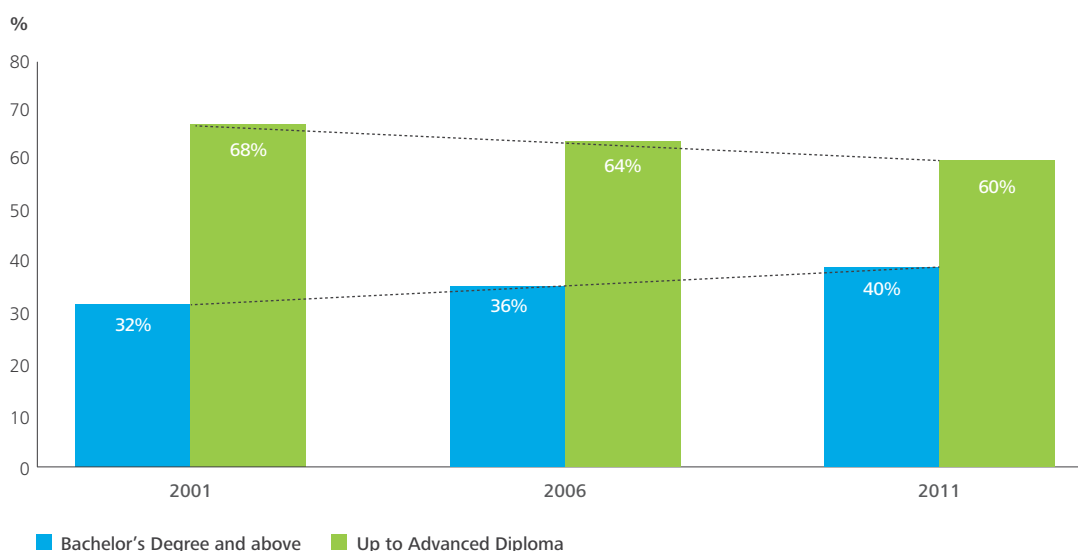
The region's young and growing population provides businesses with ready access to workers. Furthermore, as more households make Western Sydney their home, and workers invest in their education, the region's workforce is becoming more skilled and highly qualified.

Today, more than one-third of the region's population has some form of post-school qualification, which is comparable to the national figure of 36% of Australians. Western Sydney residents are also increasingly likely to be professionals, with 158,743 people – or 19% of the population – identifying as such. More of the region's professionals work in the health care sector than any other sector, which is one of Western Sydney's fastest growing industries.

¹⁰ NSW Department of Planning and the Environment 2015, Population Projections, www.planning.nsw.gov.au/projections.

¹¹ Commonwealth of Australia 2015, 2015 Intergenerational Report, <http://d3v4mnyz9ontea.cloudfront.net/2015_IQR.pdf>.

Chart 4: Degree and Diploma rates in Western Sydney



Source: ABS

The accumulation of human capital is not reserved for the professions. Workers in the region's traditional industries are also becoming more skilled. Today's Western Sydney manufacturing workers are more likely to be skilled technicians or qualified tradespeople than in the past, when they were more likely to be machine operators or labourers.

But despite the overall improvement in human capital, the region has significant gaps that need attention. Some LGAs in Western Sydney have three times the proportion of university graduates of other LGAs. Some areas are experiencing very weak labour participation rates, especially among women.

This is why closing the gaps in employment participation and skills remains such an important goal for the region. Creating jobs is fundamental, but so too is getting people in some pockets of Western Sydney into these jobs.

One opportunity for up-skilling lies in the newly defined category of grey-collar workers, who are primarily involved in service industry roles such as hairdressing, fitness, aged care, events and hospitality.¹² Grey-collar workers could progress to a qualified blue- or professional white-collar role with additional qualifications or work experience.

New research by TAFE NSW Western Sydney Institute has found industry in Western Sydney is struggling to find people with both the technical training and business management skills to fill a range of positions. To meet this demand, many of the region's vocationally skilled workers could be up-skilled in a relatively short period by undertaking business management and leadership training. This type of education may go some way toward addressing some of the existing imbalances in income and skills between the west and other areas of Sydney.

¹² TAFE NSW Western Sydney Institute 2015, Skills Barometer 2015 – Future Skills Needs for Greater Western Sydney, <<http://wsi.tafensw.edu.au/resource/file/17432/1509002-tafe-barometer-booklet-web.pdf>>.

Chart 5: Income by LGA and qualification

Top 5 median household income	Median income	Bachelor's Degree and above	Up to Advanced Diploma
1 Ku-ring-gai	\$130,416	29%	12%
2 Mosman	\$128,180	30%	12%
3 Woollahra	\$124,696	29%	10%
4 Leichhardt	\$116,168	26%	12%
5 Manly	\$115,492	25%	13%
Bottom 5 median household income	Median income	Bachelor's Degree and above	Up to Advanced Diploma
41 Fairfield	\$53,144	6%	12%
40 Canterbury	\$53,508	12%	13%
39 Bankstown	\$56,732	8%	14%
38 Auburn	\$60,320	12%	10%
37 Holroyd	\$62,868	12%	14%

Source: Deloitte Access Economics

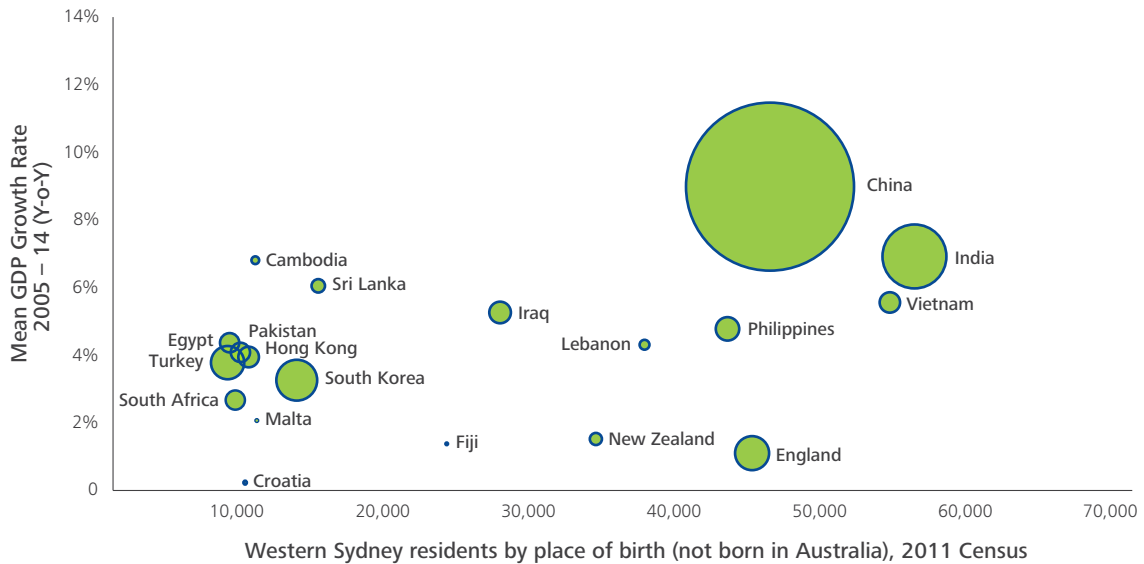
Of the 41 LGAs in Greater Sydney, four of the five lowest LGAs ranked by median household income are located in Western Sydney. None of the highest ranked LGAs are located in the west, as chart 5 above shows.

Further, the above chart demonstrates the direct correlation between median household income and rates of Degree or higher qualified residents. As shown, rates of residents holding qualifications up to Diploma level are similar for the regions shown above.

“Additional value and stimulus are created by the diversity of experience, cultures and attitudes one encounters in larger gatherings of people. Those who live in large cities or attend global conferences, for example, typically enjoy the stimulus of new and different people as much for its own sake as for what it enables them to produce.”

The purpose of place: Reconsidered, Deloitte

Chart 6: Economic potential of Western Sydney's multicultural diaspora



Source: Deloitte Access Economics

Multicultural connections

Western Sydney is home to one of the most harmoniously multicultural populations in the world, giving unparalleled advantages in terms of labour, markets and global connectivity.

Historically, immigration and a relatively high proportion of young families have driven Western Sydney's population growth. According to the ABS, 37% of the region's residents were born overseas, while 41% are couples with children, compared with 22% and 31% respectively for Australia.

Multiculturalism is deep-rooted in Western Sydney, and in some areas those roots are very deep indeed. More than 180 languages are spoken in the region, with Arabic, Cantonese, Hindi, Mandarin and Vietnamese the most common after English.

In certain LGAs, migrants represent the majority of the population. In Auburn and Fairfield, for example, more than half the population was born overseas. Significantly for the region, four of the top five migrant communities have their origins in Asia. As the nation's future becomes increasingly tied to Asia, this diversity will become an invaluable resource.

Through history, Australia has always prospered from immigration, which injects labour capacity, skills, resourcefulness and entrepreneurial spirit into the economy. New arrivals also add to the market size and the demand for goods and services. And in Western Sydney's case, the region's migrant communities will provide another powerful economic advantage: their close connections to their home countries and their capacity to engage with business and markets abroad.

Infrastructure investment

The world's leading infrastructure contractors and operators have taken strategic positions in Western Sydney, bringing with them best-practice financing and project management.

By 2050, Western Sydney will be home to 4 million people (the equivalent today of Brisbane and Perth combined), 2 million workers and more than 250,000 businesses, according to the NSW Department of Planning & Environment.

Public and private organisations are responding to this growth with the biggest and most extensive infrastructure rollout in Australia's history. All levels of government have made Western Sydney a top priority. The world's major infrastructure contractors and operators are also making major investments in the region.

The intense investment rollout by both public and private sectors already has a four-decades-long timeframe which will deliver enduring income and employment multipliers within the region. As a result, Australia's single largest pipeline of infrastructure is now in Western Sydney.

Expanding industrial and commercial space

Western Sydney has a level of planned employment lands ready to be released that is unprecedented in Australian history.

Industrial and warehousing areas are available along Western Sydney's major transport corridors, with further expansion planned around major projects including NorthConnex, WestConnex, and the South West and NorthWest Rail Links, intermodals and freight rail. There is also significant new growth of commercial premises on greenfield sites for specialist uses.

The Western Sydney Employment Area that adjoins the site for the new Western Sydney Airport at Badgerys Creek is Australia's largest employment release area. This site alone could accommodate 60,000 jobs over the next 25 years if there is appropriate attention to jobs densities.

Crucially, there is also rising investment in the region's metropolitan urban centres with surging commercial office development in Parramatta and Liverpool. Sydney's grand vision as a City of Cities is being realised across Western Sydney.

Supporting these emerging sub-regional initiatives is a stable and mature suite of government services with all levels of government invested in increasing the growth and opportunities available in the region.

The business ecosystem

Western Sydney has more than 150,000 businesses that provide over 880,000 jobs. The majority of these are small enterprises employing fewer than 20 people. The region also benefits from the increasing presence of international companies such as Arab Bank, HSBC, StarTrack, ALDI, Think Group, Lend Lease and Charter Hall.

This provides dynamic small businesses with opportunities to engage with global companies, while also being able to grow off the back of a large local consumer market.

However, services that support start-ups and business expansion in the region are thinly distributed across the region, and awareness of these services is low.

Change and disruption

Nowhere is immune from disruption, and Western Sydney is no different. The region will need to become more agile and responsive so it can adjust to economic change quickly. The region must be ready to take advantage of its inherent strengths and leverage opportunities as circumstances arise.

Like the rest of the world, Western Sydney is being affected by macro-economic trends such as declining demand for exports and micro-economic change such as digital disruption. The impact of these factors is uneven, as Deloitte explained in *Building the Lucky Country #2: Digital disruption – Short fuse, big bang?* According to the report, sectors such as finance, retail, media, and information and communications technology have comparatively short time frames ('shorter fuses') during which disruption from digital technology occurs, while also having the largest impacts ('big bangs'), both positive and negative.

At the other end of the spectrum, industries such as mining, construction and many manufacturing sub-sectors have longer fuses and face smaller bangs. Sectors like education and health are set to experience profound changes, but have longer fuses and potentially greater opportunity to plan their responses.

These profound changes will not come without pain, and there's no shortage of studies and pundits forecasting losses of jobs and entire occupations.

One recent study, *Australia's future workforce?* by the Committee for Economic Development in Australia (CEDA), predicts that almost 5 million Australian jobs – around 40% of the workforce – face the high probability of being replaced by computers and automation in the next 10 to 15 years.

"Jobs in administration and some services are particularly susceptible," the CEDA study says. "Jobs in the professions in technical and creative industries and in personal service areas (health, for example) are least susceptible to automation."

When CEDA's modelling is applied to Sydney, it shows that Western Sydney may bear the brunt of the potential job losses, although the authors stress that the results are broad estimates and don't take into account the creation of new jobs.

Rate of jobs growth

Another big challenge is turning around the region's worsening jobs deficit. This wasn't always an issue. From the mid-1960s, Western Sydney's growth in jobs outpaced that of the labour force. The proportion of residents who had jobs in the region steadily increased – rising, for example, from 59% to 64% in the 10 years to 1991. That figure remained steady until 2001, but then began falling. By 2011, 60.8% of residents had jobs in the region. It was the first time since the early 1950s that the ratio of jobs to working residents fell over a sustained period.¹³

Moreover, in the decade to 2011, no Western Sydney LGA maintained its 2001 ratio of jobs to resident workers. The biggest falls were in the inner LGAs, The Hills and Wollondilly. In the same decade, the proportion of workers commuting out of the region daily increased from 36% to 39%.

According to government forecasts, the region's jobs deficit could grow from 200,000 to more than 340,000 by 2041. Over the same period, Eastern Sydney is forecast to increase its surplus to more than 280,000 jobs.

Even more critical is Western Sydney's comparative weakness in the high-value jobs that have been driving Sydney's economic growth in sectors like professional and business services. These jobs remain concentrated in the city's east. In addition, in the decade to 2011 the proportion of jobs in fast-growth professional (business) services was below the metropolitan level in all LGAs except The Hills, according to Western Sydney University's Centre for Western Sydney.

Equally concerning is that over the next 15 years, the ratio of Western Sydney jobs as a proportion of working residents is forecast to decline.

¹³ Fagan, R, & O'Neil, P 2015, *Work, Places and People in Western Sydney*, The Centre for Western Sydney, www.uws.edu.au/__data/assets/pdf_file/0008/880235/CWS_WorkPlacesandPeopleinWS_platformpaper.pdf.

Chart 7: Number of jobs as a percentage of working residents in Western Sydney LGAs

	2015	2020	2030
Auburn	173%	170%	164%
Bankstown	94%	96%	95%
Blacktown	70%	66%	62%
Blue Mountains	56%	60%	62%
Camden	54%	38%	37%
Campbelltown	72%	72%	70%
Fairfield	82%	84%	84%
Hawkesbury	84%	88%	88%
Holroyd	88%	87%	83%
Liverpool	85%	89%	91%
Parramatta	124%	130%	129%
Penrith	74%	76%	78%
The Hills Shire	79%	76%	75%
Wollondilly	54%	57%	57%
Total	84%	82%	81%

Source: Deloitte Access Economics

The challenge of social disadvantage

Western Sydney is entering a unique phase in its history. Infrastructure investments, population growth, sectoral opportunities and other comparative advantages have the region poised to enter an exciting era of expansion.

However, a key question remains: is growth on its own sufficient to improve the local population's living standards? If growth is inequitable, then the social, moral and fiscal costs of disadvantage remain.

There are huge disparities in unemployment rates within the region, even within local government boundaries. For example, in the Blacktown LGA, Bidwill has an unemployment rate five times that of Kings Langley.

Preventable, lifestyle-related health conditions such as diabetes and smoking-related diseases exceed state averages. Apart from the costs to individuals of these conditions, collectively and over time, they affect the region's labour productivity and its health budget.

The average income of Sydney's poorest areas, many in the west, continue to lag behind Sydney's richest suburbs. Average incomes in Mosman, Double Bay and Woolwich are up to 460% greater than some suburbs in Western Sydney.¹⁴

Despite the dedication of many agencies, Western Sydney continues to struggle with pockets of severe social disadvantage. In many cases, disadvantage spreads across generations, making escaping the poverty trap even more challenging.

¹⁴ ABS 2013, 6524.0.55.002 – Estimates of Personal Income for Small Areas, Time Series, 2005 – 06 to 2010 – 11, Canberra, www.abs.gov.au/AUSSTATS/abs@.nsf/Lookup/6524.0.55.002Main+Features12005-06%20to%202010-11?OpenDocument.

These pockets of disadvantage are not inherently synonymous with Western Sydney, but in many ways they have come to characterise the region. When consulting with key stakeholders for *Designing Western Sydney*, most mentioned that the region's image problem was holding back collective confidence, growth and investment.

A study by the Organisation for Economic Co-operation and Development (OECD) found that economic growth is weakened by a widening gap between the lower middle class and poor households, suggesting that rising inequality could have reduced growth by up to 10 percentage points over two decades in some countries.¹⁵ The OECD study found that the two biggest policy interventions to address disadvantage were investment in education and employment initiatives, particularly for women.

Clearly, addressing disadvantage in Western Sydney is not just a social objective, it also makes good economic sense. A fundamental goal of *Designing Western Sydney* is to help rebalance Sydney with recommendations to ensure growth is equitably distributed, enhances the city's social capital and provides real help to the disadvantaged. It is without doubt a considerable challenge, and will require concerted effort on the part of policy makers and communities alike.

How can this be done? It may require a combination of public awareness and policy initiatives. One such initiative is from New York City, which has launched a #OneNYC campaign to promote awareness on social equity.

“There is a powerful connection between economic and social development. Trying to separate the two is a big mistake.”

Professor Michael Porter, Harvard Business School

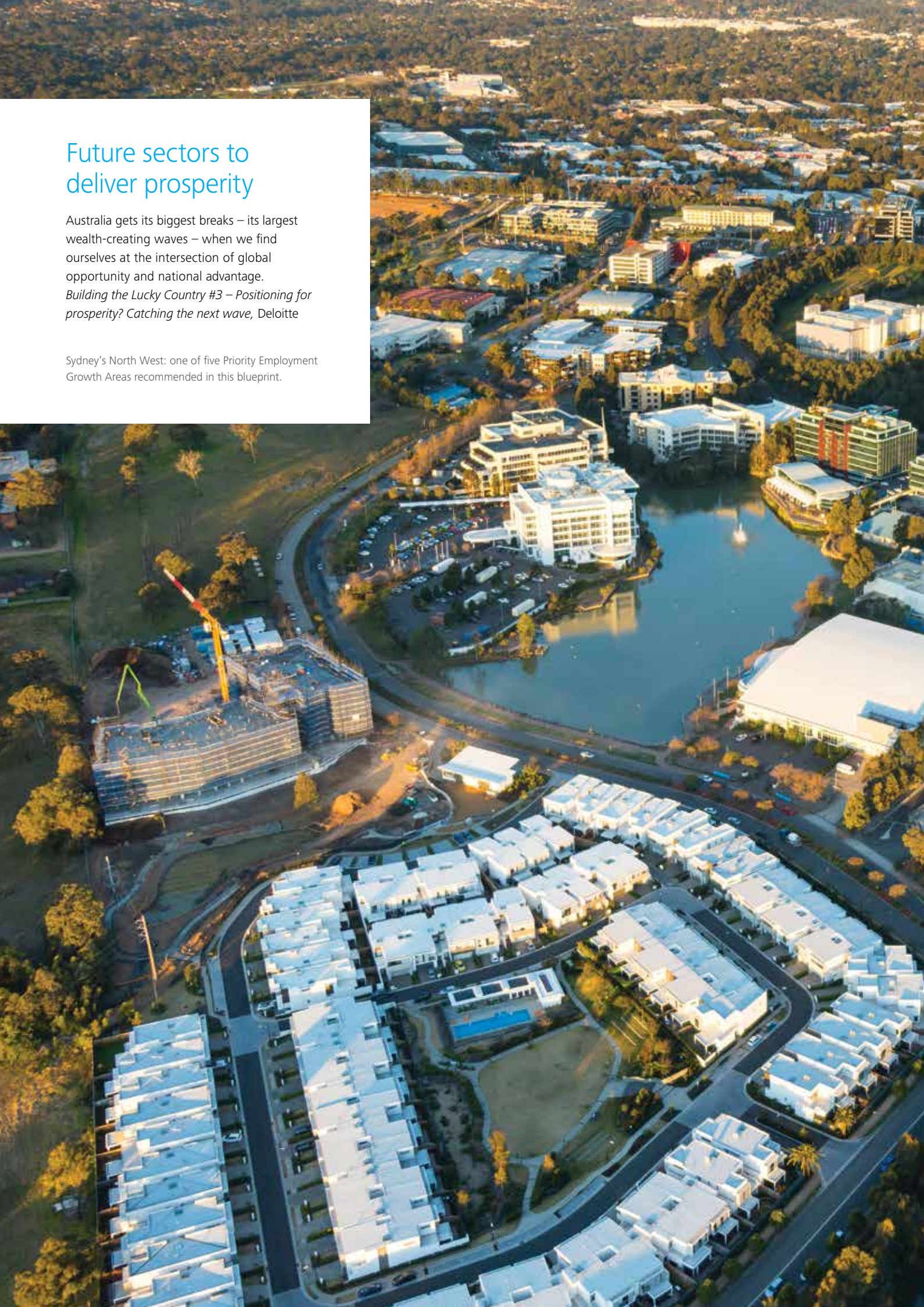
¹⁵ Cingno, F 2014, Trends in Income Inequality and its Impact on Economic Growth, OECD, www.oecd-ilibrary.org/social-issues-migration-health/trends-in-income-inequality-and-its-impact-on-economic-growth_5jxrjncwxv6j-en.

Future sectors to deliver prosperity

Australia gets its biggest breaks – its largest wealth-creating waves – when we find ourselves at the intersection of global opportunity and national advantage.

Building the Lucky Country #3 – Positioning for prosperity? Catching the next wave, Deloitte

Sydney's North West: one of five Priority Employment Growth Areas recommended in this blueprint.





In its research report, *Building the Lucky Country #3 – Positioning for prosperity? Catching the next wave*, Deloitte identified key sectors that are likely to become Australia's next waves to prosperity. The good news is that Western Sydney has comparative advantages in most of those sectors, including tourism, education, agribusiness, health, building and infrastructure construction. We also believe the region could develop greater opportunities in professional and wealth services. In addition, Western Sydney has advantages in its large manufacturing base, and has significant opportunities to enrich the region through its vibrant and growing arts and culture industry.

Catalyst and enabling sectors

Creating 200,000 great new jobs across Western Sydney in five years will require focused economic strategies in a range of industries. The most immediate prospects for growth will arise from industries in which the region already enjoys relative economic advantages. We have called these *catalyst industries*, because they can catalyse substantial jobs growth across the region.

The *enabling industries* that service the catalyst industries will also directly benefit from the growth in those industries, in turn providing further economic and employment growth across the region. This is also referred to as *Leader* and *Follower* industries in broader government and industry literature.

Supporting both catalyst and enabling industries will be crucial in growing jobs in the region over the next five years and beyond. Western Sydney's catalyst and enabling industries are listed on the right.

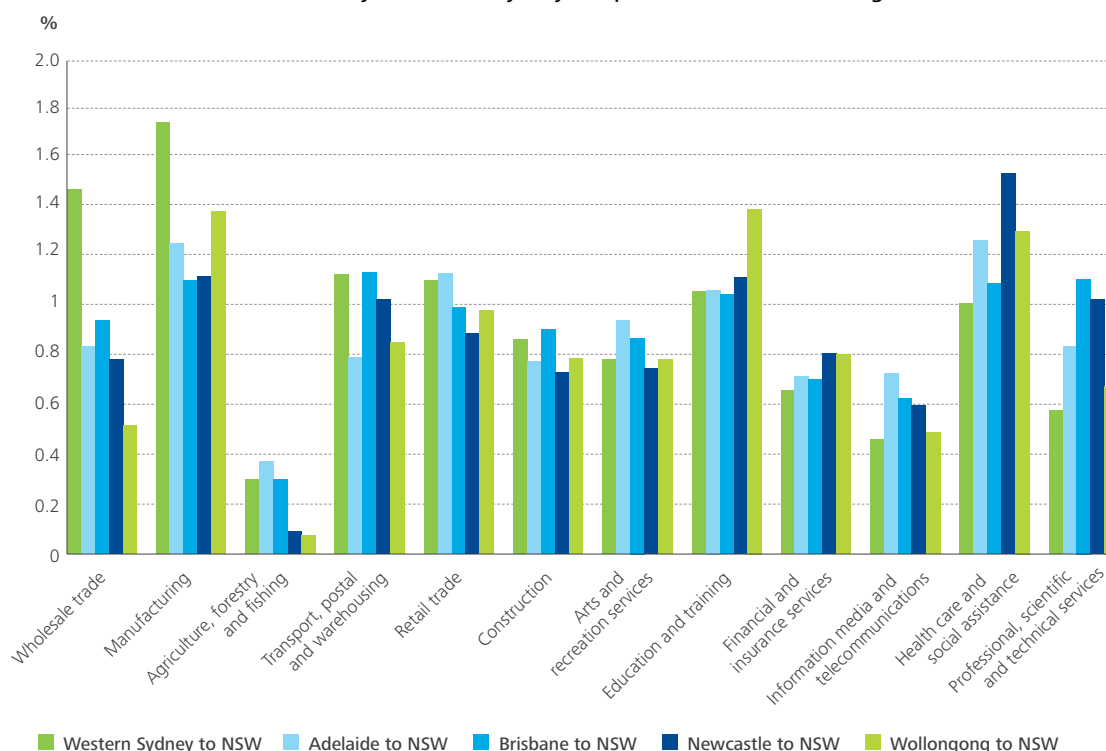
CATALYST INDUSTRIES

Health
Education
Manufacturing
Agribusiness
International education
Tourism
Professional services
Cultural industries

ENABLING INDUSTRIES

Financial services/personal
wealth management
Construction
Transport and logistics
Personal and amenity services
Retail
Government administration

Chart 8: Location Quotients Analysis: Western Sydney compared to selected other regions and cities



Source: Fairfield City Council, ABS, Deloitte Access Economics

Current specialisations

Western Sydney already has advantages in a number of specialised industries, compared with other manufacturing and industrial regions such as Wollongong, Newcastle, Adelaide and parts of Brisbane – all of which are also undergoing transformations to some extent.

We used location quotient analysis, which measures the concentration of a particular industry in an area, to compare Western Sydney with Newcastle, Wollongong, Brisbane and Adelaide.

Our analysis highlights just how much of a powerhouse Western Sydney is in the manufacturing, wholesale trade, transport and logistics sectors. These industries are highly concentrated in Western Sydney and skillfully service both national and international markets. Agribusiness is also a particularly strong industry given the urban environment that dominates the Sydney Basin.

However, the analysis also shows that some strategically important sectors need to be developed if Western Sydney is to have a more balanced economy, capable of achieving our jobs target. The region’s health care, finance, professional and technical services, and arts and tourism sectors, all lag behind those of other comparable Australian economies and to some degree may have suffered from strong competition from other parts of Sydney. Western Sydney certainly has the ingredients to do well in these sectors, but more needs to be done because these industries are strategically important for making Western Sydney a more prosperous place.

Sectors such as advanced manufacturing, which are both traditionally strong in Western Sydney and globally emerging industries, are where our greatest focus should be.

Catalyst industries

Health

Like other developed nations, Australia's population is getting older and the incidence of lifestyle-related chronic diseases is increasing. Baby Boomers will create a wave of change in the health and aged care sectors. Changes in diets and lifestyle choices are increasing the incidence of many preventable diseases, which means a long-term increase in demand for health and preventive care services.

Western Sydney is extremely well placed to cater for this demand. In fact, the health sector is already the second largest provider of jobs in the region. It boasts a strong foundation that will help drive transformation and innovation, including a large base of existing health professionals, along with strong supporting sectors such as life sciences, and medical research and devices.

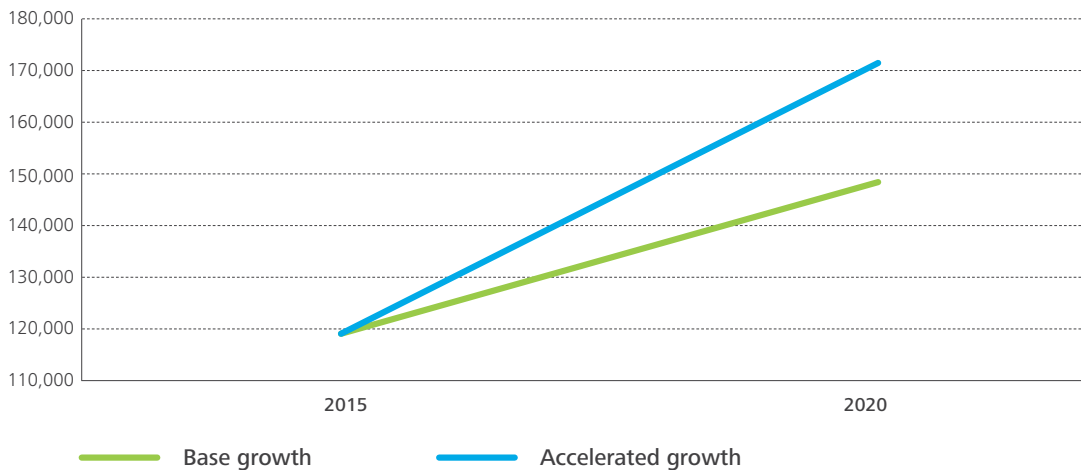
The region has five recognised health and education precincts at Blacktown, Campbelltown, Penrith, Liverpool and Westmead, where the numbers of researchers, entrepreneurs, clinicians and investors are already growing. All five precincts have teaching hospitals linked to top Australian medical schools.

Westmead and Liverpool are two of the largest hospitals in the Southern Hemisphere. These precincts combined cover just over 4 square kilometres, yet provide more than 47,000 jobs, or 7.5% of all jobs in the region. Most notably, the rate of jobs growth in these precincts is far higher than anywhere else in the region.

Opportunities in health

- Facilitate further public and private investment in and around Western Sydney's five health and education precincts
- Make use of the region's growing network of health and education stakeholders to design new models for health delivery, particularly through innovating in preventative health, palliative care and the treatment of disease
- Use the region's existing health and education assets to provide greater access to services that improve social and economic outcomes in the region
- Drive innovation and jobs growth in the region through emerging medical devices, biotechnology and pharmaceutical research sectors.

Chart 9: Projected employment numbers for the health industry in Western Sydney



Source: Deloitte Access Economics

Chart 10: Western Sydney's health and education precincts



Health and education precincts are among the region's most effective sectors for fostering jobs, skills and innovation

Health and Education Precinct facts:

- 5 precincts
- 37,000 health and education jobs
- 10,000 other jobs
- 22,000 residents
- 7.5% of all jobs in Western Sydney
- 1.5x the jobs growth rate of our centres
- +20,000 more jobs by 2030
- 110 jobs per hectare
- Billions of public and private sector investment in the pipeline

International education

Education-related services were Australia’s fourth biggest export in 2014, and its largest service export. According to the Department of Foreign Affairs and Trade, the sector generated \$17.7 billion in earnings, representing a 13.5% increase from the previous year, and it employed about 100,000 Australians. Department of Education and Training (DET) figures show that the nation’s largest education markets are also some of the world’s most rapidly growing economies, including Brazil, India, Korea and other Asian countries.

DET research also reveals that higher education is the largest contributor to Australia’s international education economy, with export revenue of \$11.7 billion, followed by vocational education and training (\$2.7 billion), English language intensive courses for overseas students (\$955 million), schools (\$636 million) and non-award programs (\$698 million). Of the 193 NSW Government primary and secondary schools available for enrolment by international students, 41 are in the Sydney metropolitan area, 25 of which are in Western Sydney.

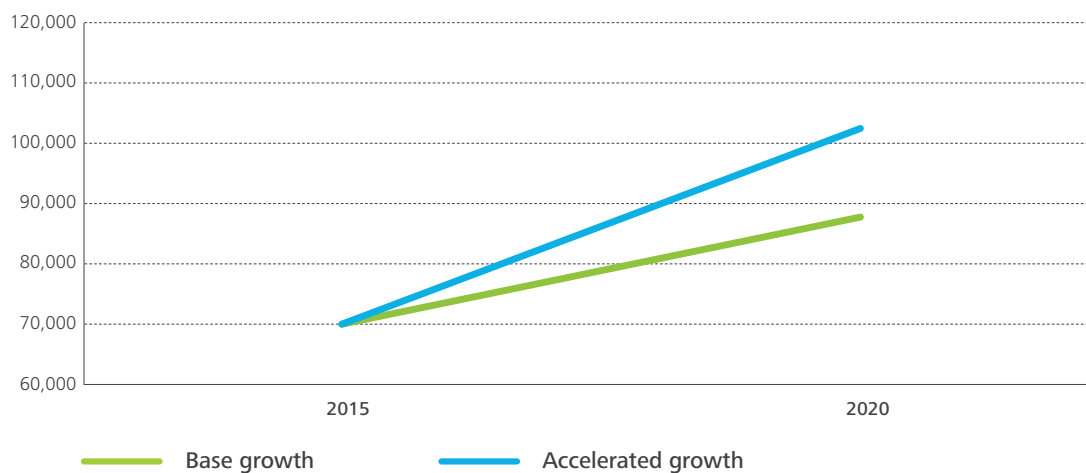
NSW’s international education market is worth \$2.4 billion, according to Tourism Research Australia. Most major Australian tertiary institutions are active in the region, although TAFE NSW Western Sydney Institute and Western Sydney University are the region’s two biggest players in terms of international student enrolments. Numerous private education providers are also active in the region.

Western Sydney University had 4,706 international students in 2014, representing more than 10% of the university’s total student population – and the university is keen to increase this figure.

Opportunities in international education

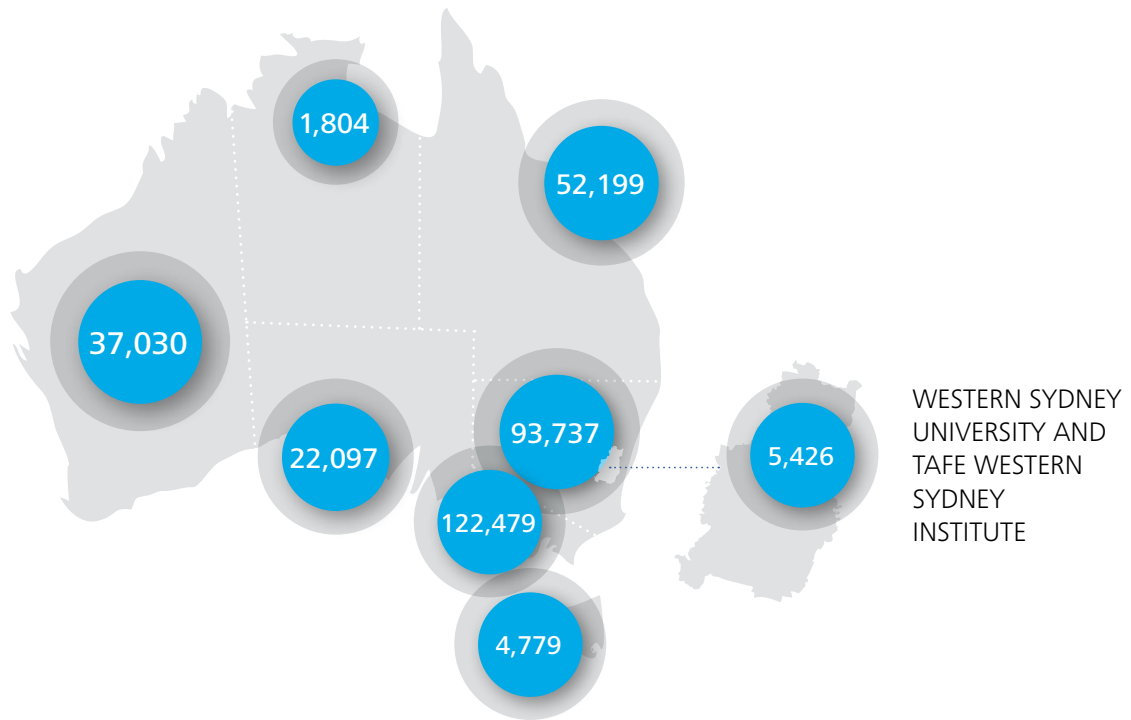
- Develop infrastructure and services for international students in the region, including housing and local amenities
- Increase opportunities for international students in primary and secondary schools, particularly English language education
- Promote international education to migrant residents’ visiting friends and relatives.

Chart 11: Projected employment numbers for the international education industry in Western Sydney



Source: Deloitte Access Economics

Chart 12: International student enrolments in higher education by state, 2014



Manufacturing

Manufacturing is Western Sydney's largest employment sector, providing more than 92,000 jobs or 15% of all jobs in the region, according to the 2011 Census. That number is down from more than 100,000 jobs in the 2006 Census. However, this apparent decline does not take into account the shifting of large components of manufacturing production into pre- and post-manufacturing activities not covered by the standard definition of manufacturing used in the Census.

In fact, Western Sydney has a significant economic advantage in this sector. The region has a large manufacturing base, with a location quotient in this sector that is 66% above the Australian average, according to Deloitte Access Economics analysis.

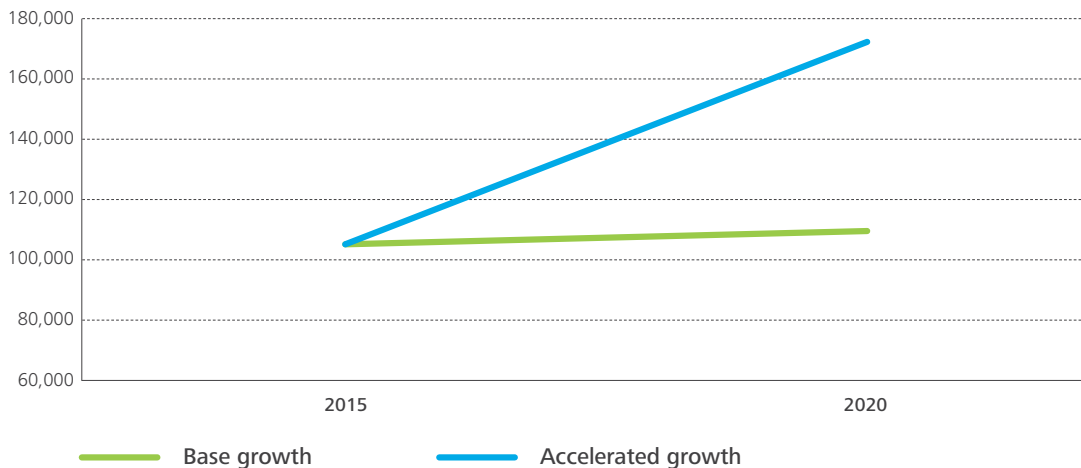
However, Australian manufacturing is at a critical point in its evolution. Industry expert Göran Roos (2012, *Manufacturing into the Future*) estimates that up to two-thirds of Australian manufacturers are 'lifestyle manufacturers' – those not driven to grow or innovate, but rather focused on maintaining their current market position. In an increasingly competitive, disrupted and globalised industry, manufacturers that don't develop or maintain a competitive edge other than through pricing may fail.

To help companies avoid this fate and make the transition to higher-value, more advanced manufacturing, Deloitte and a group of manufacturing service providers have created an entity called the Western Sydney Manufacturing Lighthouse.

Opportunities in manufacturing

- Transform Western Sydney's largest jobs sector through programs that improve innovation and competitiveness
- Integrate the sector into global manufacturing supply chains and emerging global markets for goods and services
- Tap into the latent mass of vocationally qualified blue collar workers, who through training could move into manufacturing growth sectors
- Develop new thinking about how the region grows manufacturing jobs in pre and post production processes such as product design and supply chain integration with global markets.

Chart 13: Projected employment numbers for the manufacturing industry in Western Sydney



Source: Deloitte Access Economics

Agribusiness

As incomes rise in emerging economies, so too does the kilojoule intake of their residents, who also tend to consume food with more protein. People in these countries will shift from diets largely based on grains and cereals to eating more meat, dairy, fruit and vegetables.

As a result, the world is on the cusp of a leap in demand for higher-value food products, and Australia is positioned for success due to its comparatively low-valued currency that's expected to remain low, its abundance of fresh produce that higher-income consumers will demand, and high-quality food safety standards that are internationally recognised.

Western Sydney has traditionally been Sydney's food bowl, and a diverse agricultural sector still contributes significantly to the city's requirements – particularly in niche product areas like Asian green vegetables and mushrooms. With fertile land, a reliable water supply and proximity to urban services and infrastructure, Western Sydney is well placed to take advantage of growing demand both domestically and abroad.

The region's agricultural operations comprise a mix of small family-owned farms, and businesses with larger holdings. Western Sydney boasts one of the largest equine sectors in Australia, while poultry meat production and processing is a major industry.

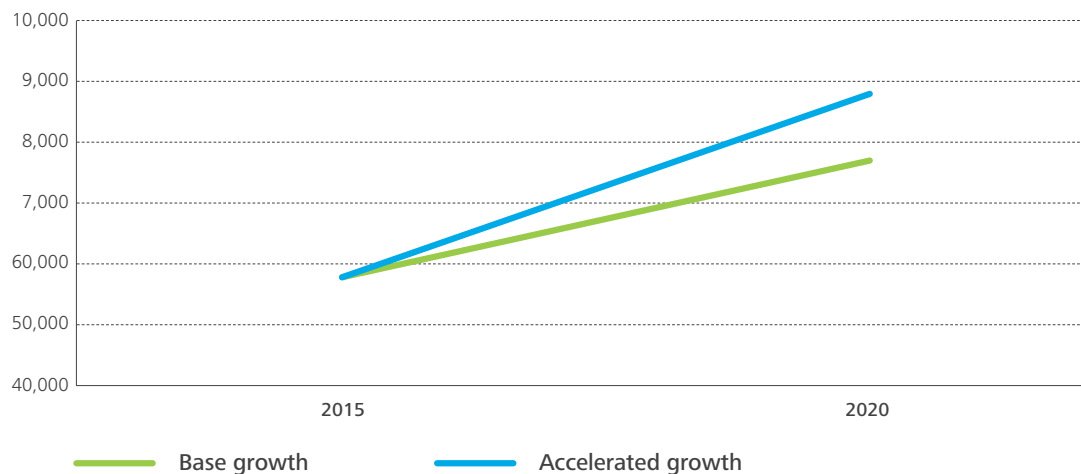
The region also has a large food and beverage manufacturing sector that could help leverage local producers and growers.

However, there are tensions between Western Sydney's expanding urban sprawl and diminishing arable land. One solution is to improve the economic value of agricultural lands through productivity improvements, along with rethinking the role the industry plays in an increasingly urbanised region.

Opportunities in agribusiness

- Encourage research into and the adoption of more intensive agricultural production
- Explore market-based mechanisms that promote agricultural uses in urban areas, and support urban farming programs
- Integrate the industry into vertical sectors such as agri-education and agri-tourism
- Plan the Western Sydney Airport to enable greater agricultural exports from Western Sydney (and NSW).

Chart 14: Projected employment numbers for the agribusiness industry in Western Sydney



Source: Deloitte Access Economics

Tourism

Australia has long lauded its natural wonders, wide open spaces, distinctive landmarks, fine food and wine, and sophisticated urban centres to lure foreign visitors. This strategy has largely worked. In 2014–15, the number of international visitor arrivals in Australia increased 6.6% over the previous year, and those guests spent \$33.4 billion.

Since the global financial crisis, Western Sydney has been the stand-out performer in domestic and international visitation to NSW. While most other parts of the state have seen declines in visitation, Western Sydney has actually seen more visitors arrive every year. This growth has been largely driven by visitors from Asia, who come here mainly to visit friends and relatives, or for business purposes.

The region also attracted more than 2 million domestic overnight visitors during the year ended June 2015, and more than 35% of day trips to Sydney were to Western Sydney.

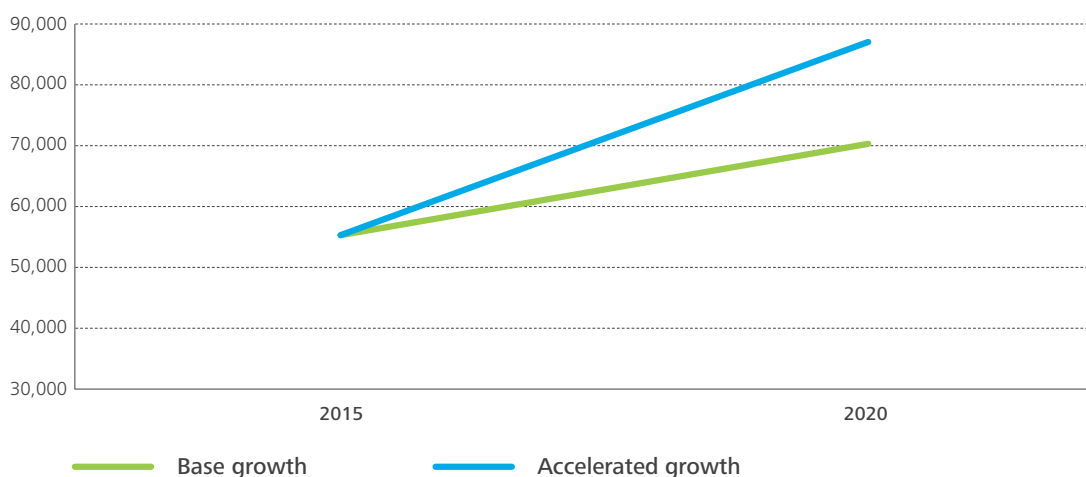
Much of this growth has been driven by a growth in the development of key tourism assets, such as the Western Sydney Parkland, multiple Olympic legacy facilities, Sydney Motorsport Park and the World Heritage-listed Blue Mountains National Park, along with growing adventure tourism and multicultural dining experiences.

The region also has significant potential for developing more visitor assets that will drive future activity and growth in the industry such as the proposed Sydney Zoo.

Opportunities in tourism

- Develop a new brand to promote visitation to the region that addresses negative perceptions about Western Sydney
- Leverage the region's underused public land assets to attract further commercial tourism facilities
- Develop an overarching tourism and events strategy for Western Sydney that improves industry and government collaboration required to grow an internationally competitive visitor economy.

Chart 15: Projected employment numbers for the tourism industry in Western Sydney



Source: Deloitte Access Economics

Cultural industries

Western Sydney is not often thought of as a leading arts and culture destination. However, analysis of this sector's contribution to the region indicates it is a nascent industry with significant economic and cultural potential.

Western Sydney had 55,911 cultural and creative industry jobs in 2011, and 87,292 cultural and creative workers. This represents a surplus in cultural and creative workers of 31,381. These workers are not 'starving artists and actors'; rather they are gainfully employed cultural and creative workers who reside in Western Sydney.

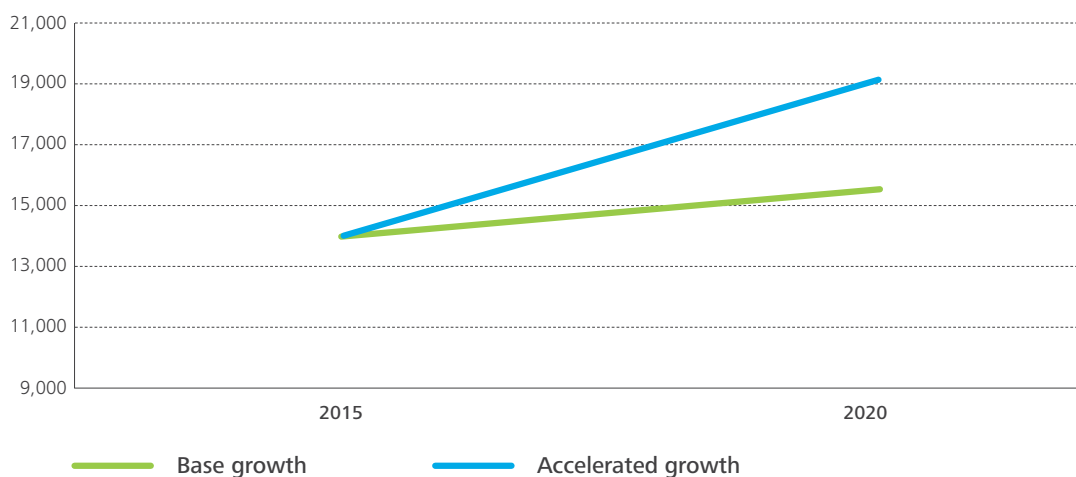
As futurists such as Richard Florida have identified, the rise of creative workforces is an important economic driver for communities. A new social class, the creative class, is emerging. Numerous cities around the world, including Newark, Brooklyn and Shanghai have been able to catalyse their economies by building on the creative class. Western Sydney has the potential to similarly transform its economy and culture through greater participation in the arts.

Greater levels of public investment in cultural arts infrastructure in Western Sydney over the coming years will drive participation in the arts and subsequent growth of the cultural arts economy in the region.

Opportunities in cultural industries

- Invest in cultural arts infrastructure in Western Sydney's city centres and link these facilities to programs that largely focus on youth engagement and innovation
- Encourage the region's Indigenous and multicultural communities to drive increased participation in cultural arts activities
- Leverage the growth of the cultural economy to drive innovation, creativity and job growth.

Chart 16: Projected employment numbers for the cultural sector in Western Sydney



Source: Deloitte Access Economics

Enabling industries

A number of industries will grow in line with population growth and play critical roles in servicing the growth of the catalyst sectors. Apart from the industries discussed below, these sectors include financial services, personal and amenity services, retail and government administration.

Building and infrastructure construction

Typically a sector that is exposed to cyclical events, Western Sydney's building and infrastructure construction industry has strong long-term prospects. With an estimated 664,000 homes to be built over the next 15 years to house 1 million more residents, the industry will be critical in enabling the region's growth.

Nationally, the engineering, infrastructure and construction industry is expected to contract sharply through to 2018. Western Sydney's planned infrastructure rollout may support the region in holding off the national decline.

Wealth management

The world is getting richer and older and as it does, the demand for wealth management services is increasing. In Asia, for example, 3 billion people are expected to join the middle class by 2030, and will account for more than half the world's financial assets by 2050, according to Deloitte's *Building the Lucky Country #3*.

Wealth management is a more customised service than other financial or business services. This means Western Sydney could compete by providing tailored wealth management services that other regions may not be able to deliver. This places the region on a level playing field with the Sydney CBD, Singapore and Hong Kong, all of which are competing to service this market.

Transport and logistics

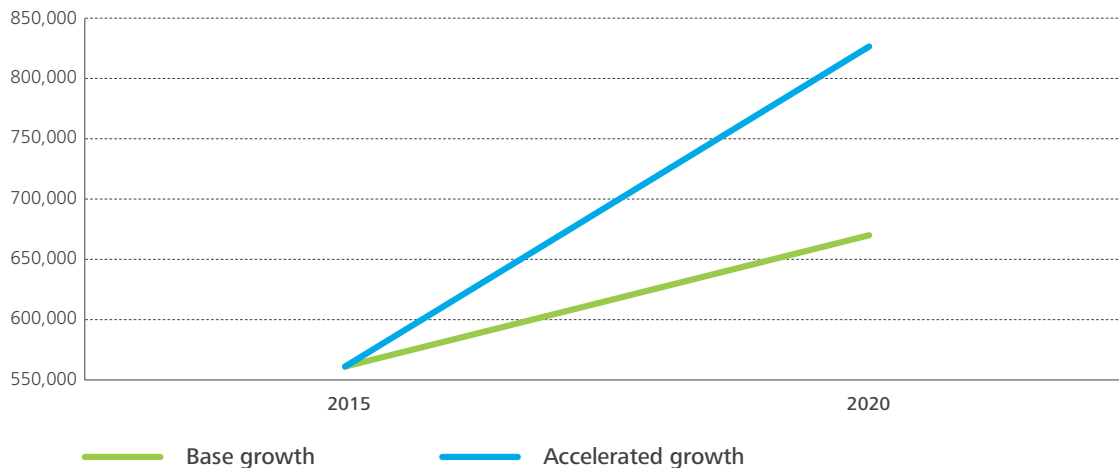
With Western Sydney's abundance of serviced industrial land, access to major motorways and growing local consumer and labour markets, it's no wonder transport and logistics is one of the region's economic success stories.

As the region further integrates itself into global economies and their supply chains, opportunities for growth in the industry will simultaneously arise.

Opportunities for growth:

- While they may play differing roles in creating jobs, the opportunities for enabling industries are often not that different to those of catalyst industries. How businesses innovate and integrate themselves into Western Sydney's growth sectors may determine their long-term outlook.

Chart 17: Projected employment numbers for the enabling industries in Western Sydney



Source: Deloitte Access Economics



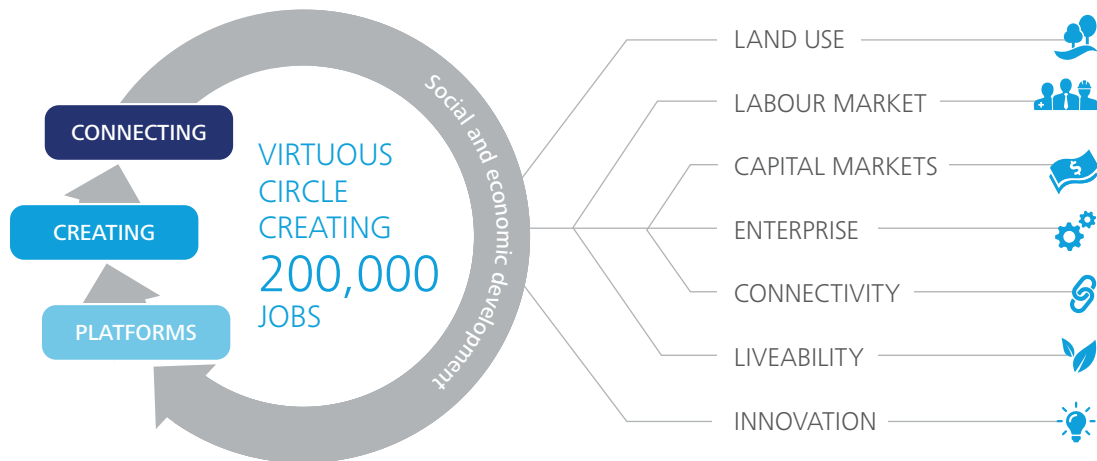
PART II
25 strategies
for creating
200,000 jobs





Sydney Olympic Park: projects of this scale, coordinated effort and investment will be needed to reach our jobs target.

Chart 18: Framework for creating jobs



The *Designing Western Sydney* blueprint for change includes strategies presented in three categories, with recommendations to boost the platforms for jobs growth, creating jobs and connecting people to jobs. Together, each group of strategies is designed to create a virtuous circle of growth underpinning the social and economic development of Western Sydney.

The three groups of strategies include:

Platforms for growth: Like any blueprint, our blueprint includes a set of foundations or platforms that enable other strategies. Platform strategies transcend the region, and position it more broadly for growth.

Creating jobs: With the goal of this blueprint to create jobs in Western Sydney, these key strategies include interventions that directly lead to greater investment and more jobs in the region. These strategies focus on the specific industries and places where the best opportunities for jobs growth are expected to occur.

Connecting our people to jobs: Ensuring Western Sydney's labour market is adequately prepared to take advantage of local job opportunities requires interventions that prepare the region's resident workers for the jobs of tomorrow. This final set of strategies will be critical in connecting growing local job opportunities to the people who live in Western Sydney.

Each strategy has a number of recommendations and actions. The strategies include calls to action for businesses, communities, individuals and governments to play their roles in creating 200,000 great new jobs in Western Sydney by 2020.

Seven levers explained

Designing Western Sydney uses seven economic levers through which the blueprint's recommendations will accelerate jobs growth in Western Sydney, as listed below.



Land includes all production sites and natural resources. Specific recommendations around advanced manufacturing, agribusiness, tourism and urban renewal look to increase the productivity and sustainability of land use in Western Sydney.



Labour includes all human resources. The blueprint's recommendations address these three challenges so Western Sydney workers are primed to fill 200,000 great new jobs.



Capital includes all man-made resources and finance necessary to acquire these and the other factors of production. Recommendations focus on capital formation led by both the private and public sectors.



Enterprise includes the management ability and business initiative necessary to transform the other three factors of production into economic outputs. Many of the second suite of strategies – Creating jobs – focus on fostering the skills and building the knowledge necessary for entrepreneurs to start and expand businesses in Western Sydney.



Connectivity includes both digital and physical linkages both within Western Sydney and with external stakeholders including in Sydney, NSW, Australia and our trading partners more broadly. *Designing Western Sydney* looks to enhance the ability to make, maintain and enhance connections in the value chain and also in communities.



Liveability is the sum of many factors that contribute to the quality of life in a community, including educational opportunities, cultural resources, entertainment and recreational options, health services, and walkability. The blueprint aims to increase liveability to attract workers and businesses and also increase the quality and frequency of their interactions by creating vibrant communities.



Innovation is the process of creation, renewal and transformation. The blueprint seeks to drive the creation of innovation communities wherever possible, due to the strong positive externalities this creates for all elements of the community and economy.

Applying 25 strategies using seven levers

PLATFORMS *strategies*

NEW APPROACHES TO PLANNING FOR EMPLOYMENT

GOVERNING AND ADVOCATING FOR WESTERN SYDNEY

OPTIMISING THE WESTERN SYDNEY AIRPORT (WSA)

A 40-YEAR WESTERN SYDNEY INFRASTRUCTURE VISION

ORIENTATE PUBLIC TRANSPORT FROM THE CENTRE OF SYDNEY

LEVERAGING OUR MULTICULTURAL DIASPORA

A WESTERN SYDNEY INNOVATION CORRIDOR

URBAN RENEWAL TO PRIORITISE JOBS

CREATING SMART CITIES

PLUS ONE

CREATING *jobs strategies*

HEALTH AND EDUCATION

ADVANCED MANUFACTURING

AGRIBUSINESS

TOURISM

ENTERPRISE AND INNOVATION

100 MICRO INFRASTRUCTURE INITIATIVES

SUSTAINABLE NEW SUBURBS

CONNECTING *jobs strategies*

FUTURE SKILL SHORTAGE PLANNING

SKILLS EXCHANGES AND DEVELOPMENT

PROMOTION OF CAREERS DURING SCHOOL-TO-WORK TRANSITION

DEVELOP HUMAN CAPITAL IN AREAS OF HIGHEST DISADVANTAGE

IMPROVE LABOUR MARKET ACCESS

BUILD STEM SKILLS

NEW WORKER HOUSING

INVESTMENT IN CULTURAL INFRASTRUCTURE

LEVERS



LAND



LABOUR



CAPITAL



ENTERPRISE



CONNECTIVITY



LIVEABILITY



INNOVATION

Platform strategies

Platform strategies aim to have impact that transcends the region, setting it up for success by providing the springboards for job creation.

Blacktown International SportsPark: an example of the amenities required to attract skilled workers and businesses to the region.



New approaches to planning for employment









Creating 200,000 jobs in Western Sydney by 2020 will require Olympic-scale thinking and coordination. It will also need new approaches to infrastructure and employment planning, along with institutions empowered to increase investment in Western Sydney.

Context and insights

Creating jobs on the scale needed to reach our target in five years will require efforts similar to those mobilised for Sydney Olympic Park and, more recently, Barangaroo. These two mega-infrastructure projects are responsible for creating 10,000 jobs and an anticipated 24,000 jobs respectively. Each was, or is, governed by a coordination authority responsible for developing a multi-purpose employment, residential, entertainment and recreational precinct.

Significant latent investment and employment potential already exists within many of Western Sydney's strategic centres. This potential is largely unrealised due to lack of local infrastructure or planning certainty. To unlock this potential, the region needs new approaches to planning and creating jobs. These approaches need to go beyond conventional land use planning and infrastructure coordination, and create the amenity and cultural distinctiveness needed to attract workers and employers. This new thinking needs to be embedded across the whole of government, particularly in entities such as the Greater Sydney Commission.

Recommendations

- 1 Five Priority Employment Growth Areas to be declared in Western Sydney: Badgerys Creek (which includes Sydney Science Park and Badgerys Enterprise Zone); Werrington Business Park; the Olympic Corridor (Westmead to Olympic Park); Bankstown Centre; and Camden. 
- 2 The Greater Sydney Commission to be tasked with coordinating and streamlining the urban renewal of the cities of Penrith, Liverpool and Campbelltown through targeted urban renewal program development, including working with INSW to prioritise funding for urban infrastructure. 
- 3 A new Western Sydney Development Authority (WSDA) to be established to work in partnership with councils to renew the region's city centres and other Priority Employment Growth Areas. 
- 4 The WSDA to report to the Greater Sydney Commission and Jobs for NSW to ensure planning and funding for initiatives is linked to the delivery of State Government jobs and dwellings targets. 
- 5 Greater Sydney Commission to be located in Western Sydney and set the target of creating 200,000 great new jobs by 2020. 
- 6 Employment growth area infrastructure plans and funding plans to be prepared for the region's five Priority Employment Growth Areas and four regional city centres (Parramatta, Penrith, Liverpool and Campbelltown). 
- 7 The Greater Sydney Commission to work with councils to conduct an initial review of the region's urban renewal plans to identify where significant infrastructure could be provided to support future employment growth. 
- 8 The Greater Sydney Commission to provide annual reports on the blueprints' progress in reaching Western Sydney's job target. 

Governing and advocating for Western Sydney

Western Sydney's various councils and advocacy organisations have had significant successes in driving change and attracting public and private investment. However, local parochialism often stifles regional progress.




Context and insights

Local governments will be vital in helping the region reach the target of 200,000 new jobs. However, three governance problems are holding back investment and job creation. These include:


- A *collective action problem*, where a failure to cooperate across local boundaries leads to missed opportunities in attracting investment
- A *capital efficiency problem*, where dominant regional voices drown out weaker ones, resulting in public investments that have not been deployed in places where they could have the greatest impact on job creation
- A *subsidiarity problem*, where lack of capacity within councils results in services that would be optimally delivered at the local level being provided by other levels of government.

Recommendations

Governance

- | | | |
|----|---|---|
| 9 | All Western Sydney councils to adopt a popularly elected mayoral model, starting with those currently undergoing local government reform. |  |
| 10 | No rate capping to be applied to councils with popularly elected mayors, on the proviso that four-year community, infrastructure and urban improvement plans be tied to funds for all rate rises. |  |
| 11 | Local government reform to consider the devolution of front-line community infrastructure from state government to local government in areas such as social housing, youth engagement and employment support. |  |

Advocacy

- | | | |
|----|--|---|
| 12 | All <i>Designing Western Sydney</i> 25 Champions to work with business and government leaders to deliver the recommendations in this blueprint and help drive the region's jobs growth over the next five years. |  |
|----|--|---|
-

Optimising the Western Sydney Airport

The Western Sydney Airport (WSA) could be a game changer for the region. While completion of the airport could be a decade away, measures can be taken now to set up Western Sydney for future economic advantage.

Context and insights

By the mid-2020s, Australia will have a brand new international gateway. The airport at Badgerys Creek promises to be a full-service, 24-hour operation that will transform passenger movement into and out of Australia's busiest and most populated city. Effective, long-sighted planning over the next five years will be critical in ensuring the airport makes the biggest possible economic contribution to the future of Sydney.

Recommendations

- | | | |
|----|---|---|
| 13 | Upon opening, the WSA to be curfew free and connected to Sydney CBD and the four regional cities through express train services. Planning for a fast train system connecting the two airports to the Parramatta and Sydney CBD's to be commenced by 2020. |  |
| 14 | Upon opening of the WSA, the future Sydney Orbital Train network linking the North West and South West Rail Links via the WSA and St Marys to be completed. |  |
| 15 | A white paper on how Western Sydney can achieve the full economic potential of the airport to be coordinated by the NSW Department of Industry, along with a bipartisan sub-regional economic plan to maximise the opportunities of the airport to be prepared by the Greater Sydney Commission, the Committee for Sydney and the Liverpool, Penrith, Campbelltown, Camden, Wollondilly, Fairfield and Bankstown councils. |  |
| 16 | Following the completion of the white paper and economic plan, the NSW Department of Premier & Cabinet and the NSW Department of Industry to jointly establish a Western Sydney Airport Export Assistance Taskforce and Investment Attraction Unit to exploit economic opportunities arising from the new airport, particularly those related to the recent Australian Free Trade Agreements with China, South Korea and Japan, and Trans-Pacific Partnership agreements. |  |

A 40-year Western Sydney infrastructure vision

"A 40-year infrastructure plan would allow for the right projects to be put forward at the right time to support the right growth. Achieving this goal would require overcoming one of NSW's great challenges – the politicisation of infrastructure – so that everyone can work towards the region's common vision for infrastructure and growth."

Luke Houghton, National Head of Infrastructure Advisory, Deloitte Australia

Context and insights

Since colonial settlement, Western Sydney has been playing infrastructure catch-up with the rest of Australia. Over the next 40 years, however, a strong pipeline of planned infrastructure investments will see Western Sydney emerge as one of Australia's leading economic powerhouses.

A long-term vision is vital to guide and encourage the investment needed for the region's infrastructure. This vision needs to include plans for transport, utilities, communications, cultural activities, health, education, and sporting and social infrastructure, along with some consideration of the forms of infrastructure that could be required in the future.

This vision is necessary to provide the long-term certainty and clarity that will encourage private sector investment, and a platform on which future residential and commercial suburbs can be developed.

This vision must be articulated for the 21st century using comprehensive 3D mapping of the region's infrastructure needs to 2055. Creating a comprehensive vision will require data inputs from councils, utilities, government departments and residents. It will also need to be informed by a wide range of social, economic and environmental perspectives. Most importantly, however, the vision needs to be non-political.

Recommendations

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|-----------|--|---|
| 17 | Western Sydney University's Centre for Western Sydney to lead the development of a 40-year infrastructure vision for the region. |  |
| 18 | Within two years, the NSW Department of Planning & Environment to develop an interactive 3D model of the region's current and proposed social and economic infrastructure. |  |
| 19 | The NSW Department of Planning & Environment to coordinate the participation of the state's infrastructure agencies in supporting the creation of the 40-year vision, and to complete a comprehensive audit and benchmark of Western Sydney infrastructure (including social, transport and amenity infrastructure). |  |
| 20 | Infrastructure Australia work with relevant state authorities to agree harmonised design and planning standards for economic, social and public transport assets to reduce costs and improve contestability and market participation. |  |
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Orientate public transport from the centre of Sydney

“With huge volumes of people coming to the region, transport should be the top priority for connecting people to jobs. Transport infrastructure takes such a long time to deliver. If we do not address this to start with, the region is going to come to a standstill.” **Ned Mannoun, Mayor, Liverpool City Council**







Context and insights

Sydney’s public transport system was originally designed as a series of radially orientated rail lines emanating from Central Station. This system is slowly being augmented by new rail lines supporting a more polycentric design that includes systems orientated north to south, not just east to west. One of the biggest game changers is the proposed Western Sydney Orbital Rail (WSOR) corridor that will link the North West and South West Rail Links, via St Marys and the new airport.

The WSOR would be one of the most significant urban infrastructure investments in Australia, providing vital metropolitan connectivity and stimulating new waves of growth and economic agglomeration.

The WSOR would also provide, for the first time, reliable public transport access for some of Australia’s most disadvantaged suburbs. The centrepiece of this new orbital rail system would be Sydney’s new Central Station, located at Parramatta.

Recommendations

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| 21 | Sydney’s number one public transport priority to be the development of a 15-minute express service between Parramatta and Sydney CBD, followed by 30-minute express services from Sydney to both Penrith and Liverpool CBDs, along with Rouse Hill town centre. Commitments to these upgrades to be achieved by 2020. |  |
| 22 | The WSOR to be prioritised, with funding allocated and work commenced within five years. |  |
| 23 | The NSW Government to divert funds from the M5 Cashback Scheme to seed funding for the WSOR. |  |
| 24 | NSW Government to investigate funding the WSOR using a value-sharing scheme. |  |
| 25 | Prioritisation of the delivery of the Eastern Creek Intermodal facility within the NSW Infrastructure strategy. |  |
| 26 | Planning for the development of the Olympic Corridor to support higher density housing, making use of existing recreational facilities in the Corridor, along with the unique commercial opportunities within the Corridor. Specific instructions to review the Camellia Precinct Plan to include light rail connectivity. |  |

Leveraging the region's multicultural diaspora

"Western Sydney's multicultural diaspora could become a key comparative advantage for the region. However, more needs to be done to turn this diversity into an advantage. We should use this strength and say to the world, 'We are a place which you can be a part of'." **Patricia Forsyth, Executive Director, Sydney Business Chamber**

Context and insights

The high proportion of Western Sydney residents born overseas offers a powerful comparative advantage through migrants' links to the rest of the world. A range of Australian and international business groups already connect the region to overseas markets, offering a significant economic opportunity for Western Sydney and more broadly Australia – but more can and should be done.

Recommendations

- 27** The state government to commission a Western Sydney strategic plan to identify the export and direct investment opportunities available through migrant groups' connections, including a focus on how the recently signed Australian Free Trade Agreements with China, South Korea, Japan, and the Trans-Pacific Partnership agreements can benefit the region. 
 - 28** The Sydney Business Chamber, and NSW and Commonwealth governments, to act on the opportunities identified in the strategic plan, including the establishment of a Western Sydney Trade Desk to provide access to overseas trade facilities in China, South Korea, India and the Middle East. 
 - 29** Three multicultural micro business support centres to be established at Blacktown, Liverpool and Bankstown, with the backing of agencies including TAFE, the Department of Industry and Multicultural NSW. Designed to grow international business, these centres would provide migrants with help in gaining recognition of overseas qualifications, better information on local careers, opportunities to improve their language skills and business start-up advice. 
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A Western Sydney Innovation Corridor

“There’s not another area in Sydney or Australia that has the potential to create jobs and change like the Innovation Corridor because it’s right in the middle of high growth cities like Liverpool and Penrith, and the second Sydney airport. If we can get it right, we can really change Sydney.”

John Vassallo, Celestino Chief Executive

Context and insights

The Western Sydney Innovation Corridor was identified by Western Sydney University as a future economic development zone that could build upon a number of current and proposed economic infrastructure projects.

New, innovative industries are drawn to regions with low start-up costs, a pool of young, highly skilled people and connections to the broader knowledge economy. Affordable and flexible rent or lease options, potential tax breaks and regulatory concessions can help add to the attraction, creating an environment where highly educated, entrepreneurial people at the start of their career work together to create a commercial zone known globally for its innovative practices and outcomes.

The Western Sydney Innovation Corridor would be a hotbed of highly adaptable, internationally competitive and technology-engaged industries of the future. It would also support the north–south orientation of Sydney’s transport networks that governments and stakeholders in the region have sought for so long.

The Corridor would be based on the region’s existing innovation entities, which (from south to north) include Campbelltown Integrated Health Hub, South West Growth Centre, Oran Park Town, Camden Veterinary Science, Western Sydney Aerotropolis, Sydney Science Park, Western Sydney Science Centre, Sydney IQ, North West Growth Centre and Hawkesbury AgriPark.

Recommendations

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| 30 | The Western Sydney Innovation Corridor to be included in the state government’s metropolitan planning strategy, <i>A Plan for Growing Sydney</i> , and recognised as being an important enabler for future sub-regional planning conducted by the Greater Sydney Commission. |  |
| 31 | A Western Sydney ‘digital ecosystem’ to be resourced to grow the region’s emerging skills and investor pool in differentiating economic subsectors like edutech, agritech, healthtech and autotech. |  |
| 32 | The Innovation Corridor’s areas of thematic expertise to be internationally marketed to attract global talent, investment and co-location; referencing Western Sydney’s large-scale infrastructure investments and emerging innovation policy settings as additional attractors. |  |
| 33 | More innovation ‘shopfronts’ – like Western Sydney University’s LaunchPad – to be created across Western Sydney CBDs to act as practical, agile and diverse points of interaction between industry, researchers and government. |  |
| 34 | A call for additional public ideas on what the Corridor could offer in terms of science, innovation and creativity opportunities. |  |
| 35 | A comprehensive ‘case for investment’ to be developed, presenting the case for private sector investment in key areas within the Corridor. |  |
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Light Horse Interchange: one of several new road systems that have improved Western Sydney's connectivity in the new millennium.

Urban renewal to prioritise jobs



Western Sydney is a growth economy and key centres, corridors and precincts will have increasingly important roles in providing the liveability, connectivity and amenity that will attract businesses and skilled workers to the region.

Context and insights

The region's urban renewal efforts have generally focused on increasing housing supply, with jobs creation a secondary consideration. Even greenfield and brownfield developments are often designed around housing, with jobs and amenity retrofitted around housing supply.

To create more balanced city centres that offer both employment and housing, jobs need to be created where the majority of Sydneysiders live – in the west.

Recommendations

- 36 Urban Growth NSW to be tasked to work with Penrith, Liverpool and Campbelltown City councils to reduce the risk of developing council – and state government-owned land and buildings in city centres for amenity, mixed use and liveability. 
- 37 Urban Growth NSW to match its target of providing 10,000 additional homes in Western Sydney with a target of creating 10,000 jobs in the region by 2021. 

Creating smart cities

“Smart cities apply digital technologies to make better use of infrastructure and public spaces, and to improve public safety. People interact in new ways, stimulating creativity and allowing the emergence of innovative clusters of businesses and more vibrant neighbourhoods.” *Deloitte’s Building the Lucky Country #5: The Purpose of Place Reconsidered*,

Context and insights







Developing smart cities or smart places in Western Sydney is one good way of shaping the future of Western Sydney. Smart cities use sensors and actuators to allow remote monitoring and managing of urban infrastructure services, including transport, telecommunications, energy, water, health and emergency services.

This can improve service quality and allow more efficient allocation of resources, such as varying tolls to reduce road congestion or making better use of capacity in electricity networks. These smart systems generate data the public can use (such as the location of buses and trains), which helps people make the best use of their time.

One metric often used to identify a city likely to attract innovation clusters of businesses and workers is a ‘walk score’. A walk score is an index based on the distance to amenities such as grocery stores, schools, parks, libraries, restaurants and coffee shops.

A 2015 study by Cushman & Wakefield found that US employers are increasingly relocating to centres where workers are able to live closer to their place of work and that offer walkable access to recreational and lifestyle opportunities.

Recommendations

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| 38 | A Western Sydney open database to be created, allowing private and public data contributors to provide useable information that allows third parties to develop new platforms and apps in areas conducive to developing smarter cities. |  |
| 39 | Urban Growth NSW to develop a proactive policy of developing Western Sydney technology start-up precincts, aligning with broader urban renewal efforts in the region. |  |
| 40 | Free Wi-Fi to be provided in all regional city centres. In collaboration with local universities and TAFE NSW Western Sydney Institute establish youth creativity centres offering courses such as robotics, coding, gaming and 3D printing. |  |
| 41 | Walkability action plans to be developed by Western Sydney’s four regional city centres to identify the services and facilities required to achieve walk scores over 70. |  |
| 42 | The Greater Sydney Commission to incorporate walkability planning in its sub-regional plans, with funding provided by the Department of Planning & Environment to councils in developing their walkability action plans. |  |
| 43 | NSW to follow California and Singapore in executing the technical and statutory requirements for developing an autonomous vehicle (AV) test zone in Western Sydney, where developers and manufacturers can safely deploy AV technology for street testing on demarcated routes. |  |

Plus one



What if every business in Western Sydney was empowered to hire one more employee? How can we challenge businesses to grow and in doing so create more jobs in Western Sydney?

Context and insights

Almost three-quarters of businesses in Western Sydney have an objective of growing their businesses over the next 12 months, according to the recent Making Western Sydney Greater report.¹⁶ However, only half of these businesses have prepared a formal business plan or strategically reviewed their business to identify growth opportunities.

A range of free and subsidised state and federal government business support, development and advisory services can assist businesses in Western Sydney to grow. Encouraging local businesses to access these services – and developing an enterprising culture in the region – will be important in lifting the rate of job creation.

Recommendations

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|-----------|---|---|
| 44 | Local chambers of commerce and other business support agencies to develop cooperative campaigns to raise awareness among the business community of the plethora of resources available to support businesses. |  |
| 45 | One-third of the Jobs for NSW Fund to be allocated to Western Sydney, matching the commitment to regional NSW. |  |
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¹⁶ Making Western Sydney Greater Q2 2015, wsbc.org.au/Resources/Documents/Making%20Western%20Sydney%20Greater%2002.pdf.

Creating job strategies

We need to move urgently from a discussion about protecting the jobs of today to creating the jobs of the future. This includes ensuring that there is a workforce skilled in attributes required by business.

Catherine Livingstone, President, Business Council of Australia

Wet'n'Wild Sydney: one of the recent successful investments that are attracting tourists and jobs to the region.



Health and education


Western Sydney's Health and Education Precincts represent some of the region's best examples of economic infrastructure with billions of dollars' worth of public and private investment currently mobilising in and around our precincts.

Context and insights

Western Sydney has five health and education precincts (HEPs) in Blacktown, Campbelltown, Liverpool, Parramatta and Penrith. Together they provide more than 37,000 jobs in these two sectors, and a further 10,000 jobs in related services. This represents approximately 7.5% of all jobs in Western Sydney. Job numbers are growing within these precincts 1.5 times faster than in the region's major city centres. As part of preparing *Designing Western Sydney*, Deloitte facilitated a series of workshops with health and education stakeholders to develop a HEP Growth Plan. This plan will be guided by a new advisory group with the charter of achieving the following goals over the next five years:

- Re-designing the delivery of health, starting in Western Sydney
- Growing five vibrant precincts
- Using the precincts to drive education and community development
- Providing new economic activity and investment to create local jobs for local people.

Recommendations

46	The Western Sydney HEP Advisory Group to be formed, including a formal governance arrangement for the next five years (already commenced).	
47	Ministers of the following portfolios to nominate senior representatives to participate in the HEP Advisory Group: Health, Medical Research, Health Infrastructure, Education, Family and Community Services.	
48	The Western Sydney HEP Growth Plan to be submitted to the NSW Government in the second quarter of 2016 (already commenced).	
49	Western Sydney HEPs at Blacktown, Campbelltown, Liverpool, Parramatta and Penrith to be recognised as strategic centres in future metropolitan and sub-regional planning.	
50	The NSW Department of Planning & Environment to undertake detailed land use and infrastructure needs assessments of each precinct to prioritise precinct interest and facilitate private sector investment in the HEPs. This includes refining planning mechanisms to encourage investment opportunities.	
51	A collaborative program between public and private sectors to be developed, with a charter to design and test new models and opportunities in health care and prevention (already commenced).	
52	An annual Western Sydney Health and Education Innovation Hub to be facilitated, where public and private sector stakeholders share data and ideas about potential health services and preventative care that could be developed into commercial solutions to reduce growing government health budgets.	
53	The state and federal governments commit to funding pilots or trials of 20 ideas from innovation hubs over the next five years.	
54	An online Western Sydney Health and Education Innovation Hub to be established where public and private sector stakeholders share data and ideas about potential health services and preventative care that could be developed into commercial solutions to reduce growing costs to public health budgets. Models such as Telstra's innovation program that leverages crowd sourcing, design thinking and gamification should be considered.	
55	The HEPs to be developed through the establishment of five project groups: research and commercialisation, investment attraction, urban renewal, education and skills, and wellbeing. The wellbeing group to look at developing corporate wellbeing programs in the region to improve workplace productivity.	
56	Strategies to be developed to ensure Western Sydney workers can take up employment opportunities arising from the growth of the region's health and education precincts.	

Advanced manufacturing

“Western Sydney is actually the largest manufacturing area in Australia. You wouldn’t know it. We need to create a manufacturing brand in Sydney and let people know about it.” **Leon Drury, Manufacturing Skills Australia**

Context and insights

Western Sydney has a large manufacturing base that is set for a transition up the value chain, driven by innovation and proximity to a growing Asian middle class.

However, many companies will need to adapt and innovate so that they can become advanced manufacturers and remain competitive in a disrupted and globalised industry. Manufacturing Skills Australia, RDA Sydney and Deloitte are jointly developing an entity called the Western Sydney Manufacturing Lighthouse (WSML) to help companies make this transition.

Recommendations

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|----|---|---|
| 57 | The WSML to be established to facilitate collaboration between Western Sydney’s manufacturing sector, its service providers and peak bodies such as the Advanced Manufacturing Cooperative Research Centre and the Advanced Manufacturing Growth Centre (AMGC). |  |
| 58 | The WSML to initially facilitate market-led joint opportunities for the region’s manufacturers, and to develop a Western Sydney Advanced Manufacturing Capability Register, which would promote the region’s manufacturing capabilities and identify the gaps. |  |
| 59 | The NSW Department of Industry to establish an Advanced Manufacturing Knowledge Hub in Western Sydney, similar to those developed in energy innovation, financial services, digital creative, medical technology, transport and logistics. |  |
| 60 | The federal government to establish a CSIRO manufacturing research facility in the Western Sydney Innovation Corridor. |  |
| 61 | The ABS to establish an Australian and New Zealand Standard Industrial Classification and Occasional Paper for advanced manufacturing in Australia. |  |
| 62 | Western Sydney’s top 100 manufacturers to be identified for participation in the AMGC. |  |
| 63 | Local, state and federal governments to recognise the WSML as a peak industry voice for manufacturing service providers in Sydney. |  |
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Agribusiness

"The moment the farmer considers themselves an industrialist ... farming will be considered among the least hazardous and most profitable of occupations." **Henry Ford (1922)**

"In the past century there have been huge strides made in production techniques, with many aspects of a modern farm mechanised beyond what Ford could have imagined. But with an expected surge in demand for Australian commodities from a growing Asian middle class, farmers will have to improve production methods to ensure that this opportunity does not pass us by." **Deloitte's Farm of the Future – part 1**¹⁷

Context and insights

As incomes rise and diets change in Australia's neighbouring economies, the world is on the cusp of a leap in demand for higher-value food products. Agribusiness therefore represents a big global opportunity for Australia and potentially Western Sydney.

Agribusiness only accounted for about 5% of industry in NSW in 2011, but Western Sydney punches above its weight in key sub sectors such as poultry, Asian vegetables, nurseries and turf, and food and beverage manufacturing.

However, the industry faces a potential problem. As urban sprawl eats up prime agricultural land, a mechanism is required to balance the housing needs of a growing population against its need for food. If agribusiness is to grow in Western Sydney and exist within an increasingly urbanised region, more intensive and innovative forms of agriculture will be required. Research and innovation will become an even more critical part of driving success.

Recommendations

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| 64 | The federal and state governments, in collaboration with Western Sydney University and the established Hawkesbury agricultural sector, to establish a Sydney Agriculture and Food Production Research Institute to support research into food bio-security and food production. |  |
| 65 | Planning for the Western Sydney Airport to include a 30-year freight and logistics strategy that seeks to protect the regional and international supply chain pathways of the agribusiness sectors from urban development. |  |
| 66 | The NSW Department of Primary Industries and Department of Planning & Environment to investigate and trial a market-based Agricultural Enterprise Credit Scheme that enables land owners to gain additional development rights in exchange for agribusiness space in other locations. |  |
| 67 | Support for urban farming programs within the Western Sydney Parklands (and elsewhere in Western Sydney) to be expanded to develop future agribusiness skills. |  |
| 68 | An agri-education plan for NSW schools to be developed by the NSW Department of Primary Industries and the Department of Education, in partnership with the Hawkesbury Agripark and the Elizabeth Macarthur Institute. |  |
| 69 | The Department of Planning & Environment and local councils to remove barriers, develop practical guidelines and allow flexible leasing options for urban gardens and greenhouses in town centres and high-rise residential developments, such as on rooftops, in decommissioned infrastructure corridors and in other urban spaces. |  |

¹⁷ Deloitte, Farm of the Future – part 1, www2.deloitte.com/au/en/pages/consumer-business/articles/farm-of-future-part-1.html.

Tourism

“For tourism in Western Sydney to be truly successful, all LGAs must work to break down the fierce parochialism that hinders good policy outcomes – we need to sing with one voice.” **The Hon. Stuart Ayers MP, NSW Minister for Trade, Tourism and Major Events**





Context and insights

In 2012, the state government launched the NSW Visitor Economy Action Plan (VEAP) with a target to double overnight visitor expenditure in NSW to \$36.6 billion by 2020. Western Sydney will play a key role in helping NSW achieve this target. It will require a whole-of-government approach in partnership with industry. However, the region is facing some challenges in this sector, including:

- Negative perceptions about Western Sydney
- Skills shortages, as tourism workers flock to higher profile attractions elsewhere in the city
- Market fragmentation and a lack of critical mass of events or tourist attractions (with the exception of the Blue Mountains)
- Underdeveloped infrastructure and transport links between the region’s highly dispersed attractions
- Lack of communication and collaboration in the tourism industry and between local government areas
- No central tourism strategy for Western Sydney.

However, Western Sydney has some competitive advantages including multicultural cuisine and attractions, sporting facilities, events such as the Defqon.1 and the Royal Easter Show, business tourism and natural attractions. In addition, the region’s vast tracts of undeveloped land can be used for new leisure and tourism facilities, and some significant investments are already being made. The state government and Western Sydney Parklands have had considerable success attracting new facilities to the region, such as Sydney Motorsport Park, Wet’n’Wild and the proposed zoo in Bungaribee Super Park.

Recommendations

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| 70 | Destination NSW to prepare a Western Sydney Visitor Economy Strategy detailing local industry partnerships that could increase tourism in the region. |  |
| 71 | Expressions of interest to be called for the development of indoor or outdoor entertainment, leisure and tourism facilities at five sites near the tourism corridor between Badgerys Creek, Bungaribee and the Penrith Lakes, with the state government to offer long-term leases to the operators of these facilities. |  |
| 72 | That the state government recognise Sydney Olympic Park as the base for a tourism, hospitality and events centre of excellence to leverage existing institutional investments such as the Sydney Showground and Olympic Stadium, including the establishment of associated vocational and tertiary education facilities in the centre. |  |
| 73 | A government and industry compact to be developed, providing funds for five-year tourism and hospitality scholarships for school leavers from disadvantaged backgrounds. |  |







Enterprise and innovation

“For each new high-tech job in a city, five additional jobs will be created outside high-tech in that city over the next 10 years. This is why the rise of innovation is so crucial: it is more than just the jobs in innovation that are at stake – the entire nation’s economy is at stake.” **Enrico Moretti, Economist and author**

Context and insights

Entrepreneurs are key drivers of innovation, productivity growth and employment. Governments around the world actively promote entrepreneurship through various forms of support. However, according to a World Economic Forum report, the Australian start-up ecosystem lags behind many other advanced nations due to a lack of education, limited engagement with universities and poor cultural support for entrepreneurs.¹⁸ The good news is that Australia’s fledgling start-up sector has experienced a groundswell of activity over the past few years. For example, there is strong growth in the number of incubators and accelerator programs, along with an awareness of the value of start-ups, and the role of innovation more generally.

Recommendations

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|----|---|---|
| 74 | Innovation partners, including Western Sydney University, the CSIRO and the Digital Creative Knowledge Hub to create a register and map of Western Sydney’s innovation ecosystem, containing details such as specialists, facilities and infrastructure. |  |
| 75 | A Western Sydney Innovation Platform to be developed, including online and physical meeting places for entrepreneurs and knowledge workers to share ideas and develop innovation concept briefs. |  |
| 76 | Innovate NSW and the Department of Industry, Innovation and Science to work with Sydney universities and research institutes to identify, fund and appoint Western Sydney ‘innovation brokers’, whose role would be to bring together innovation ecosystem partners to advance and commercialise concept briefs. |  |
| 77 | Two new incubators at Westmead (for medical technology) and Sydney Science Park (for applied sciences) to be established to support the funding of new start-ups (much like the Griffin Accelerator in Canberra) ¹⁹ , along with the establishment of a mentor program at the existing Werrington LaunchPad incubator. |  |
| 78 | The Greater Sydney Commission to enforce the inclusion of research, commercialisation, innovation and start-up facilities in sub-regional planning processes through the development of new land use types that encourage innovation in mixed-use environments, particularly where complementary infrastructure exists. |  |
| 79 | Western Sydney councils to identify local businesses that may qualify for federal and state government commercialisation and entrepreneur programs to assist in the transition from innovative micro businesses to mid-sized businesses. |  |

¹⁸ World Economic Forum, Entrepreneurial Ecosystems Around the Globe and Company Growth Dynamics, www3.weforum.org/docs/WEF_EntrepreneurialEcosystems_Report_2013.pdf.

¹⁹ Griffin Accelerator, www.griffinaccelerator.com.au.

100 micro infrastructure initiatives



Western Sydney has major transport infrastructure projects in the planning or under construction. However, there are hundreds of potential micro infrastructure projects across Western Sydney that would support jobs growth.

Context and insights

Western Sydney has huge opportunities now and over the next 10 years in its major transport infrastructure projects, such as the Western Sydney Airport. However, smaller-scale, local projects can also have a big impact in getting businesses, investments and our town centres growing. They can also improve the liveability, walkability and safety of town centres and local communities.

Micro infrastructure projects that may qualify include local transport, social and cultural infrastructure, with a value under \$50,000. If 100 were to be funded each year until 2020, it would lead to 500 projects providing fine-grained improvements which would collectively transform the region. Of course, projects would need to demonstrate how they will create jobs, either directly or indirectly.

Recommendations

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| 80 | The state government to allocate \$25 million over five years for 100 micro infrastructure projects in Western Sydney. |  |
| 81 | Western Sydney councils to procure project ideas from their communities in areas such as business improvement, social infrastructure, local transport and others that can demonstrate how jobs will be created. Ideas to be independently assessed, followed by community voting for the projects that should be funded each year. All projects to be developed by community groups. |  |

Sustainable new suburbs

"Sustainability, liveability and productivity ... are interconnected... We need to focus on our environmental assets."

The Hon. Robert Stokes MP, Minister for Planning







Context and insights

As one of the driest continents on earth entering a period of significant climate change, the nation's water resources need good management.

The capacity of Sydney's drinking water system has been tested in the past, while waterways, rivers and lakes are also important to individuals' quality of life.

Governments have made significant investments to mitigate against future water shortages with additional storage capacity built across Sydney. However, people also need to adapt the way they use water to increase the sustainability of water resources. To this end, Western Sydney has the opportunity to leverage investments in reticulated water systems that currently have limited network coverage. Water produced by the region's small number of reticulated water treatment plants is ideal for agricultural land, parkland and a range of industrial uses. It will also help mitigate the environmental impact on the region's broader waterways.

Recommendations

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|----|---|---|
| 82 | The state government to introduce a policy that directs public sector agencies and councils over the next 10 years to only use reticulated water for streetscape and horticultural purposes. |  |
| 83 | The government to commence expanding the water supply network from reticulated systems to enable access for parklands and sports facilities. |  |
| 84 | The government to direct developers of residential and infrastructure projects to use reticulated water on construction sites (for purposes such as dust suppression) along with being required to report on its use. |  |
| 85 | The government to seek that every home in newly announced suburbs be 100% sustainable with greywater systems, and every house powered by solar or other renewable sources. |  |
| 86 | Sydney Water to lead the establishment of a water and environment cluster around Parramatta and Camellia that leverages existing business enterprises and promotes relevant skills training. |  |
| 87 | New and old employment areas to develop green action plans to improve the amenity of urban areas. |  |
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Connecting job strategies

We need to ensure the region's working age population has the skills, willingness and confidence to take advantage of the economic opportunities other strategies aim to create over the next five years and beyond.

Rooty Hill: with good transport links and other facilities, one of Western Sydney's better-connected suburbs.








Future skill shortage planning

"Western Sydney is forecast to undergo major economic and population growth, with government and the private sector targeting the region for increased investment and future business activity. But a major skills shortage, identified in a recent survey of Western Sydney businesses, could constrain this growth if training and future skills needs are not addressed." **Robin Shreeve, TAFE NSW Western Sydney Institute Director**

Context and insights

Understanding where jobs will emerge in Western Sydney is important. Equally as important is having local workers with the right skills and qualifications to take up new work opportunities. This involves ensuring both workers and training providers have accurate information about future skills requirements, along with opportunities to acquire relevant qualifications and experience so they can engage in the growth industries of the future.

Recommendations

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|----|---|---|
| 88 | <i>Skills Barometer 2015</i> ²⁰ , a report based on an audit of the region's skills needs, to be distributed to every Western Sydney high school. |  |
| 89 | The federal Department of Employment to produce long-term (five to 10-year) Western Sydney job and skills forecasts. |  |
| 90 | A Western Sydney Skills Strategy to be developed to address the region's skills gaps. |  |
| 91 | A business census to be conducted every two years by the Greater Sydney Commission in partnership with councils to identify current and future jobs and skills requirements. |  |
| 92 | All new career information to be prepared in languages reflective of Western Sydney's multicultural diversity, including demystifying the apprenticeships system for migrant communities. |  |

²⁰ TAFE NSW Western Sydney Institute and Western Sydney Business Connection, Skills Barometer 2015: Building a skilled workforce for Greater Western Sydney, wsi.tafensw.edu.au/resource/file/17432/1509002-tafe-barometer-booklet-web.pdf.

Skills exchanges and development

“We’re creating 25,000 training outcomes on Barangaroo through an on-site hub that is designed to enable workers to learn new skills, develop existing ones and improve their future employment prospects.”








Duncan Ellis, TAFE NSW Western Sydney Institute Director

Context and insights

For Western Sydney to take full advantage of the growth forecast for the region, it’s vital that its workforce has the skills needed for the future. The skills exchange program developed by TAFE NSW Western Sydney Institute (WSI) is a great example of an initiative helping to achieve this, with the first successful implementation on the Barangaroo urban renewal project.

More than 10,000 construction workers will help build the Barangaroo precinct over a 10-year period. The WSI, the Construction and Property Services Industry Skills Council and Lend Lease have teamed up to develop an on-site hub for Barangaroo workers to provide the services described above. This partnership between private industry and TAFE is unprecedented, and it is getting extraordinary results. The Barangaroo skills exchange has provided more than 7,000 training outcomes over the past 18 months.

Recommendations

- | | | |
|----|---|---|
| 93 | The Barangaroo skills exchange program to be replicated for other major infrastructure projects in the region, including the Western Sydney Airport (WSA) the Olympic Corridor light rail, Sydney Science Park, Moorebank Intermodal, Parramatta Powerhouse Museum and the Parramatta Stadium upgrade. |  |
| 94 | The skills exchange model to become a requirement for government procurement for large projects, and that funding be provided that is specific to each project and the needs of the industry in receipt of funding. |  |
| 95 | Australia’s large developers and infrastructure providers to enter into a Western Sydney Skills Exchange Compact that invites their commitment to developing skills on all large construction projects in Western Sydney, with a particular focus on developing skills among the region’s long-term unemployed. |  |
| 96 | A transport and logistics training centre of excellence to be established in Liverpool by industry, TAFE NSW, Western Sydney University and other relevant training providers. |  |
| 97 | A Western Sydney Airport skills program to be established, with the aim of supporting secondary school students progressing to vocational and tertiary study in airport-related service industries. |  |
| 98 | Parramatta be the home for a national centre of excellence for the training and upgrading of skills for financial planners, in line with the recommendations of the Financial Systems Inquiry (Murray Review). |  |
| 99 | Sydney’s TAFE institutes be consolidated into two institutes – one focusing on Western Sydney, the other on Eastern Sydney. |  |

Promotion of careers during school-to-work transition

Employer engagement in education has become a policy priority for governments around the world, driving the need for new models that show how it can best be delivered to support young people and other stakeholders.







Context and insights

Navigating the path from school to work isn't easy, and it's made even harder without support networks or mentors providing advice, direction and role models. In communities with multigenerational unemployment, the transition is even harder, if not impossible.

Current government initiatives to address the issue are largely focused on industry investment, job creation and workforce preparation through apprenticeships and traineeships. However, research by UK educationist Dr Anthony Mann has shown that if young people get just three positive experiences in a particular field or occupation, it is extremely likely they will become positively engaged in a life of work and participation.²¹

It's vital that schools, TAFE institutes, universities and businesses provide these experiences to young people in Western Sydney. There are two challenges in achieving this. The first is ensuring all stakeholders have the skills and capacity to work collaboratively and ensure these partnerships are sustainable and effective. The second is presenting a compelling case for businesses and industry leaders to play a leadership role in investing in the future of Western Sydney's young people.

Recommendations

- | | | |
|-----|---|---|
| 100 | Undertake an audit of existing school-to-work transition programs in the region to determine gaps and areas for improvement. |  |
| 101 | High schools to work with key Western Sydney business organisations to identify 10 local business ambassadors or mentors for every Western Sydney high school located in a low socio-economic LGA, including partnering with not-for-profit and government-funded programs that currently support school-to-work transition in the region. |  |
| 102 | Leading Western Sydney professional service businesses to provide ambassadors at local high schools, partnering with existing school-to-work transition programs in the region. |  |
| 103 | Western Sydney schools in low socio-economic LGAs to have access to professional development sessions to build their capacity to engage with community stakeholders and improve student outcomes and employment pathways. These sessions would adhere to National Teacher Standards and be accredited and run by organisations such as the Beacon Foundation. |  |
| 104 | The NSW Department of Education to increase the capacity of career advisors in Western Sydney schools through regular training and development and the creation of a supporting network with local industry leaders and tertiary education institutions. |  |
| 105 | School-to-work programs to be embedded in the Year 11 and Year 12 programmes of all Western Sydney high schools to build an awareness of jobs and skills pathways in future and emerging industries. |  |

²¹ Anthony Mann, www.educationandemployers.org.

Develop human capital in areas of highest disadvantage

An OECD study found that the single biggest impact on economic growth is the widening gap between lower middle class and poor households.



Context and insights

Pockets of Western Sydney live with extreme disadvantage. In some places this is a multigenerational problem. Clearly, the region's unemployed represent a significantly underutilised resource.

Disadvantage is most prevalent among the young, women and Indigenous Australians, with the most vulnerable often concentrated in a small number of suburbs. These places and groups require specific interventions to support greater social and economic participation.

Community service organisations perform much of the work in helping the disadvantaged. They broker and provide many of the services that support the individuals most at risk of slipping into lives of disengagement, and help disengaged residents move back into the workforce. The region has a number of community service organisations that punch above their weight in terms of community impact, but the sector is still critically under-resourced.

Recommendations

- | | | |
|-----|---|---|
| 106 | Deloitte and Western Sydney Collective to work with the social enterprise sector to identify 50 new investors and 50 entrepreneurs to fund and establish new businesses to provide services in Western Sydney's most disadvantaged areas. |  |
| 107 | Government and industry to hold a Western Sydney Careers Expo and Jobs Summit that would bring leaders and stakeholders together to generate ideas to support Western Sydney's most disadvantaged suburbs, with one goal to create 10,000 new jobs for the region's long-term unemployed. |  |
| 108 | The Centre for Western Sydney to develop a Knowledge Economy Index for Western Sydney that would measure the region's progress in prosperity. |  |
| 109 | Deloitte to work with the Western Sydney Collective to enable cross-sector discussion among the region's community service organisations and develop an action plan to respond to the many factors contributing to areas of disadvantage. |  |
| 110 | Western Sydney Collective to engage with the School for Social Entrepreneurs and Western Sydney University to help create local social enterprises run by young entrepreneurs. |  |

Improve labour market access

“Unless we make our cities more attractive in the world, we will lose the competition for human capital.”
Jamie Briggs, Australia’s first federal Minister for Cities

Context and insights

The Centre for Western Sydney recently produced a report that showed the region’s labour market outcomes were generally disappointing or fell well short of governments’ planning aspirations. The report also revealed that access to employment in the region was inadequate to satisfy the quality of life expectations of Western Sydney households.²²

Insufficient access to jobs has resulted in increasing numbers of residents commuting outside the region for work each day. It has also created significant issues for women, young people and migrants.

Recommendations

- | | | |
|-----|---|---|
| 111 | The federal Department of Employment to audit existing programs and then initiate new programs that support the employment access needs of women, young people and migrants, and assist the reskilling of people facing mid-career changes due to industry restructuring. |  |
| 112 | An over-55 professional skills network to be developed, connecting experienced professionals with start-ups and established businesses with specific skills needs. |  |
| 113 | The Western Sydney Collective to help establish a program that would enable businesses to donate their time to registered charities, schools, not-for-profits and community groups and assist with high-priority projects, initiatives and events. |  |
| 114 | Youth outreach, child care and selected training organisations to be provided with greater access to public school facilities out of school hours. |  |
| 115 | An expansion of TAFE programs assisting degree-qualified students access training that encourages business start-ups. |  |
| 116 | A Living and Working in Western Sydney Guide to be developed in partnership with the Committee for Sydney to promote the advantages of living and working in Western Sydney for highly skilled workers. |  |
| 117 | The Western Sydney Collective to work with Western Sydney Business Chamber and Transport for NSW to improve the region’s transport services to ensure young people have safe, accessible and affordable commutes to and from work. |  |
| 118 | ‘No cost’ education programs, counselling services and employment initiatives for women to be developed, with a focus on youth, single mothers, domestic violence sufferers and the mature-aged. These measures would help women enter or re-enter the workforce and reduce their reliance on the social security system. |  |
| 119 | A women’s advocacy organisation to be established, offering programs to ensure economic independence, confidence building and education grants for women. |  |
| 120 | An online directory to be initiated, with links to employment services, education opportunities, volunteer opportunities and jobs for Western Sydney residents. |  |
| 121 | Project Learning Centres offering ‘flip-based’ learning to be established in suburbs of greatest disadvantage and focused on future skill development. |  |

²² The Centre for Western Sydney, Western Sydney University, Work, Places and People in Western Sydney 2015, www.uws.edu.au/_data/assets/pdf_file/0008/880235/CWS_WorkPlacesandPeopleinWS_platformpaper.pdf.






Build STEM skills

A recent survey by Deloitte found that 82% of Australian businesses ranked people with science, technology, engineering and math (STEM) qualifications as highly valuable to the workplace, even when their qualification was not a prerequisite for the role.²³

Context and insights

Many companies across Australia are already working with schools and education authorities to promote STEM education and careers. Many more organisations, large and small, would like to be involved but don't know where to start, who to approach or how to ensure the best outcomes for students. New ways of promoting STEM careers are required. These need to be highly effective school–industry partnerships that are used right across the education system, so many more students can benefit.

Recommendations

- | | | |
|-----|--|---|
| 122 | A STEM development program for students from Year 5 to Year 9 to be established, funded by Western Sydney industry, with assistance from the Museum of Applied Arts and Sciences, and Western Sydney University. Idea to be explored with the NSW Chamber of Commerce and Beacon Foundation. |  |
| 123 | A Western Sydney School STEM competition to be launched, with schools teaming up with complementary businesses to pitch innovative health and energy sustainability solutions. |  |
| 124 | The federal government to provide 5,000 STEM tertiary scholarships for Western Sydney students. |  |
| 125 | Australia's first STEM school to be established at the Sydney Science Park by 2025, with state government commitment for the project within two years. |  |
| 126 | The federal government to incentivise the establishment of two science and engineering education campuses in Western Sydney. |  |

²³ Australia's STEM workforce: a survey of employers, Deloitte Access Economics, www2.deloitte.com/au/en/pages/economics/articles/australias-stem-workforce-survey.html.

New worker housing

Concern over the affordability of housing for key workers in our cities is not new. However, few policies look at the housing designed for those attempting to enter the workforce.

Context and insights

Long-term unemployed and socially disadvantaged workers can often not afford to live in the centres where jobs are located. Rather, they are housed in large public housing estates often with poor transport access and proximity to employment opportunities. Programs are required that provide opportunities within jobs centres where these workers can live, while also accessing employment support services while they make the transition back into a life of employment.

Recommendations

127 Land and Housing Corporation, Urban Growth NSW and Government Property NSW to be tasked with identifying public lands in Western Sydney to identify, prioritise and offer to the market long term leases for social and affordable housing.



128 The identified public lands to be used to provide housing to people from disadvantaged communities and enrolled in employment placement programs in key job centres. Housing would be supported by employment programs and education services that assist in the transition to work, and would be available for 1–2 years or until work and career programs have proven effective.



Investment in cultural infrastructure

“In any civilised community, the arts and its amenities must occupy a central place. Their enjoyment should not be seen as remote from everyday life. Other objectives in life are all means to an end. The enjoyment of the arts is the end in itself.” **Gough Whitlam, Prime Minister 1972–75**

Context and insights

Art and culture not only define a region and its people, but they are an integral component of a dynamic, prosperous community. They can also attract new businesses and investment, and contribute to tourism. A rich cultural community helps businesses attract talented and skilled employees. As such, investing in art and culture will provide long-term economic and social benefits, ensuring Western Sydney continues to evolve as a place where people want to live, work and socialise.

Recommendations

- | | | |
|------------|--|---|
| 129 | Arts and cultural spaces to be developed in disused facilities in the centres of Penrith, Liverpool, Campbelltown and Blacktown. Spaces to link arts and cultural activities with ‘maker spaces’ and other youth activities. |  |
| 130 | The Australia Council to provide a grant of up to \$2 million to each of these councils to fit out and provide seed programming for each arts space. To access these facilities, artists and performers need to produce performance, visual or digital arts in partnership with public stakeholders. |  |
| 131 | The Special Broadcasting Service (SBS) to be relocated to Western Sydney, following a joint study of suitable locations by the federal and state governments. |  |
| 132 | The state government to support the establishment of new performing arts centres in Sydney Olympic Park, Liverpool and Blacktown. |  |
| 133 | Commitment of \$300 million be made to cultural arts infrastructure in Western Sydney over the next five years. |  |
-

Unleashing Western Sydney's economic potential

In simple terms, targeted measures that improve conditions in Western Sydney will generate large returns – not only for the region but for the nation as a whole.

Parramatta: Sydney's second-largest CBD, with an ambitious smart city plan and plenty of potential for economic growth.





Chart 19: Gross regional product forecasts for LGAs (\$ millions)

	2015	2020	2030
Auburn	9,859	11,922	14,676
Bankstown	12,003	13,826	16,790
Blacktown	17,314	24,972	30,932
Blue Mountains	3,555	4,323	5,481
Camden	2,622	3,572	4,848
Campbelltown	8,821	11,611	15,103
Fairfield	8,231	10,520	13,510
Hawkesbury	2,643	3,241	4,061
Holroyd	5,544	6,821	8,391
Liverpool	11,591	18,182	21,241
Parramatta	16,041	19,562	24,715
Penrith	7,589	9,080	11,139
The Hills Shire	16,239	18,868	23,832
Wollondilly	5,082	6,847	8,755
Total	127,133	163,348	203,475

Source: Deloitte Access Economics

Western Sydney's economy is currently valued at \$127 billion and employs some 840,000 workers. Deloitte Access Economics estimates that if the region continues with 'business as usual', its economy can be expected to increase to more than \$163 billion by 2020 and \$203 billion by 2030. This growth will see the regional job base expand to more than 1.1 million jobs by 2030.

While the business-as-usual forecasts are encouraging, Western Sydney has clear potential to substantially accelerate growth and increase opportunities for jobs.

To estimate this latent potential, Deloitte Access Economics modelled an accelerated scenario where targeted initiatives improved the region's labour market participation and education attainment rates. Using a computable general equilibrium (CGE) model, we estimated the potential economic gains to the region if the gaps between Western and Eastern Sydney in these two rates were reduced by half over the period.

Based on this modelling, we estimate that by 2020 Western Sydney's gross regional product (GRP) would increase by \$32 billion if these improvements in labour force participation and education were achieved. That represents a 20% increase in output over the business-as-usual scenario.

This economic growth would result in a 30% increase in jobs in five years, from the business-as-usual estimate of 978,000 to 1,260,670 jobs in 2020 under the accelerated scenario.

In short, the gains from improving labour force participation and education are equivalent to bringing forward more than a decade's worth of jobs growth in the region.

Chart 20: Job forecasts for LGAs

	2015	2020	2030
Auburn	61,606	69,369	80,252
Bankstown	78,594	84,998	94,980
Blacktown	111,253	131,659	157,506
Blue Mountains	22,332	25,066	29,333
Camden	22,381	31,724	39,884
Campbelltown	53,470	64,190	79,039
Fairfield	61,734	73,073	86,615
Hawkesbury	29,064	32,604	37,636
Holroyd	44,910	50,817	58,858
Liverpool	72,945	88,611	107,774
Parramatta	111,990	129,255	153,664
Penrith	74,171	83,006	95,648
The Hills Shire	82,116	97,792	118,084
Wollondilly	13,390	16,106	19,509
Total	839,955	978,270	1,158,782

Source: Deloitte Access Economics

Chart 21: Western Sydney employment forecasts

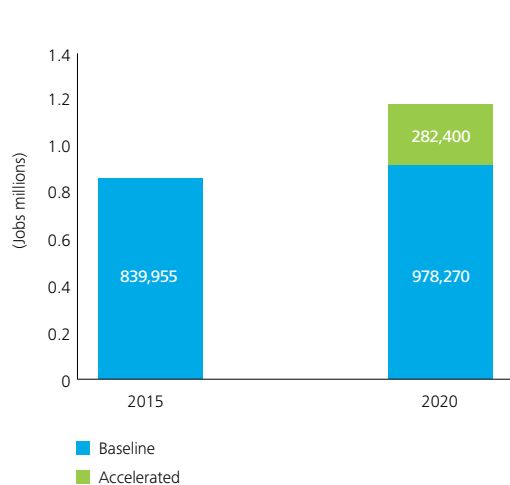
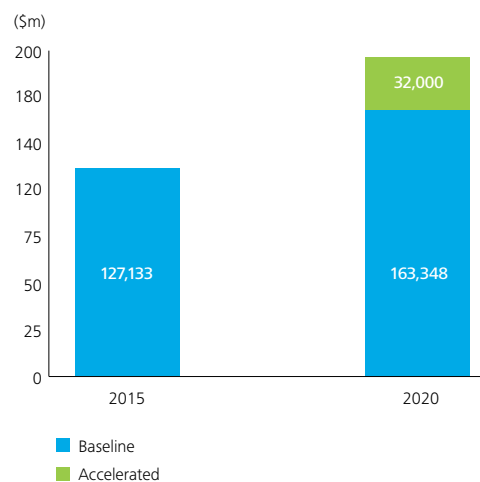
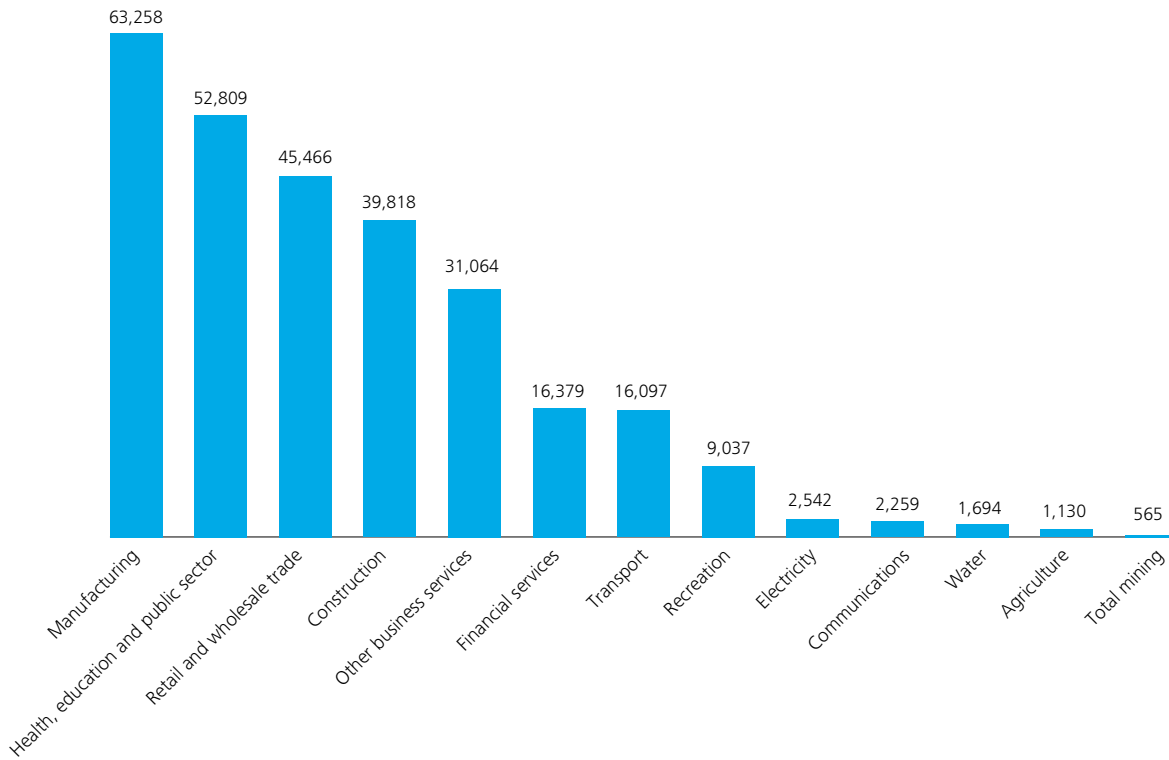


Chart 22: Western Sydney GRP forecasts



Source: Deloitte Access Economics

Chart 23: Additional jobs by industry (2020, accelerated scenario)



Source: Deloitte Access Economics

Deloitte Access Economics modelling confirms the importance and scale of the Western Sydney economy, and how measures that directly target productivity and efficiency will generate large economic gains. For policymakers looking at priorities, the potential gains for the nation from investing in Western Sydney are an important consideration.

Where jobs could be created

The Deloitte Access Economics modelling also allows us to determine where the jobs will go if labour force participation and education significantly improve.

Of the 282,400 additional jobs, nearly 40% will be created in the manufacturing, health, education and public sectors. Financial and business services are expected to represent some 15% of the additional jobs.

Few other places in the nation offer potential jobs growth of this scale in a five-year period. However, this opportunity also creates challenges. Getting the policy settings right to improve education will be critical. For the *Designing Western Sydney* blueprint to be successful, a key task will be skilling the local workforce to capitalise on the sectors with the greatest potential.

A long-exposure photograph of a highway at night. The image shows multiple lanes of traffic with bright, horizontal light trails from car headlights and taillights. Streetlights line the road, creating starburst effects. The sky is a deep blue, and the overall scene is illuminated by the warm glow of the lights.

PART III
From design
to delivery

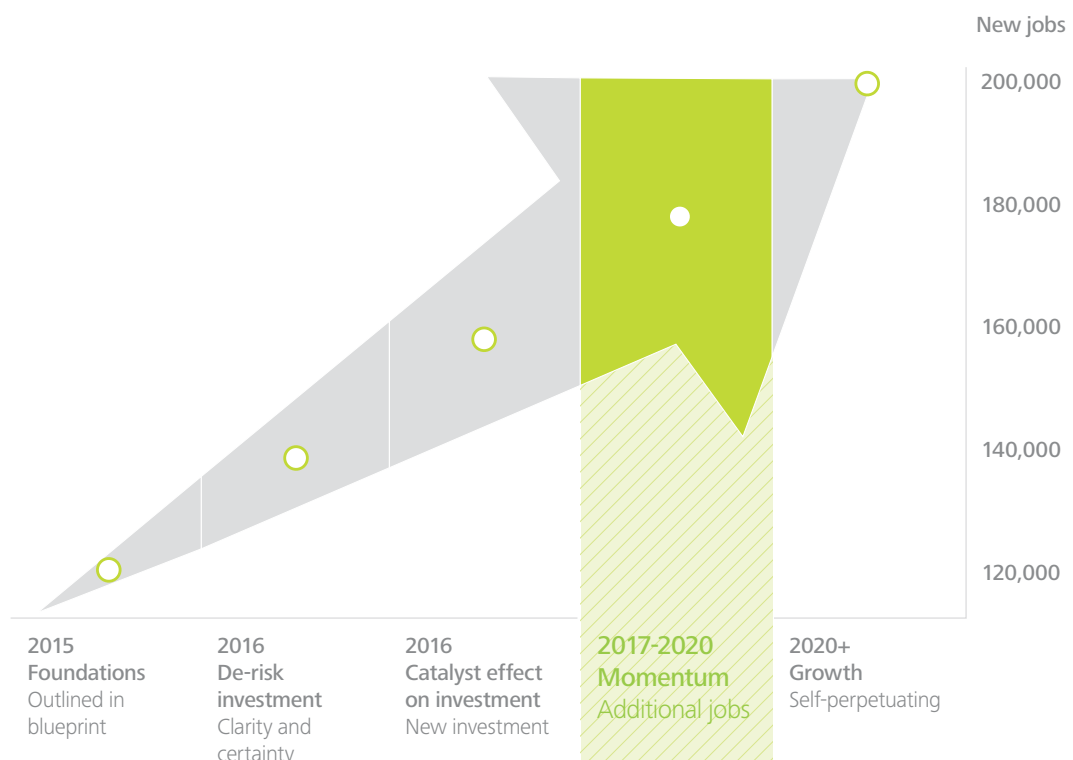
Shaping Future Cities – Designing Western Sydney will be delivered the same way it was created, through the collective efforts of a multitude of stakeholders focused on creating a better future for the region.

Designing Western Sydney has 25 strategies and 133 recommendations that have been co-designed by more than 400 Western Sydney stakeholders.

The blueprint aims to set foundations that will reduce the risk of investing in key industries and places across Western Sydney. This will be achieved through improved

clarity, certainty and promotion of the region’s strengths. This process will lead to incremental yet significant increases in investment across the region that will build momentum up to and far beyond the next five years.

Chart 24: The economic process of job creation



Timetable for success

1 JANUARY 2016 – 30 JUNE 2017
18 MONTHS

PLATFORMS FOR GROWTH

1. Five Priority Employment Growth Areas
2. The Greater Sydney Commission (GSC) role
3. A Western Sydney Development Authority (WSDA)
4. The WSDA to link (GSC) to jobs
5. GSC located in Western Sydney – adopts 200,000 jobs target
8. GSC report on progressing the jobs target
11. Devolvement of front-line community infrastructure to local government
13. A curfew-free airport connected by rail to Sydney, Parramatta and Liverpool
14. A Sydney orbital train network
16. Western Sydney Airport Export Assistance Taskforce and Investment Attraction Unit
21. 15-minute express train between Parramatta and Sydney CBDs, 30-minute express to other regional city centres
22. Prioritisation of the WSOR
27. Strategic plan to promote export opportunities from the multicultural diaspora
31. Resourcing a Western Sydney 'digital ecosystem'
32. Marketing the Innovation Corridor
33. More innovation 'shopfronts'
35. Case for investment for key assets within the corridor
36. Urban Growth NSW to work with local councils to deliver urban renewal
37. Urban Growth NSW to adopt 10,000 jobs target to be achieved by 2021
40. Free Wi-Fi linked to innovation
41. Walkability action plans
42. GSC to incorporate walkability planning in sub-regional planning
43. Autonomous vehicle test zone in Western Sydney
44. Co-operative campaigns to promote business support services
45. One-third of the Jobs for NSW Fund allocated to Western Sydney

CREATING JOBS

47. Senior public sector representatives to participate in Health and Education Precincts (HEPs) Advisory Group
50. Western Sydney HEPs infrastructure needs assessment

51. Testing new models of health delivery
52. Western Sydney Health and Education Innovation Hub
53. Health innovation hub idea pilot projects
58. Western Sydney Manufacturing Lighthouse (WSML) facilitation of market-led joint opportunities
59. Advanced Manufacturing Knowledge Hub in Western Sydney
60. Commonwealth Scientific & Industrial Research (CSIRO) manufacturing research facility in Western Sydney
61. Australian and New Zealand Standard Industrial Classification for advanced manufacturing
62. Top 100 manufacturers to participate in WSML
66. Market-based Agricultural Enterprise Credit scheme
70. Western Sydney Visitor Economy strategy
75. New innovation platforms to develop innovation concept briefs
82. Greater reticulated water usage
83. Expansion of water supply network for reticulated systems

CONNECTING JOBS

88. *Skills Barometer 2015* distribution to high schools
90. A Western Sydney skills strategy
91. Business census conducted every two years
92. Career information in languages reflective of Western Sydney's multicultural diversity
93. Skills exchange program on major infrastructure projects
94. Skills exchanges a requirement for major government procurements
95. Large developers and infrastructure providers to enter into a Western Sydney Skills Exchange Compact
96. A transport and logistics training centre of excellence
100. Audit of school-to-work transition programs
104. Training for Western Sydney school career advisors
105. School to work transition programs
107. Western Sydney careers expo and jobs summit
113. Business involvement in not-for-profits and community groups
116. A living and working in Western Sydney guide
127. Public lands for mixed social and affordable housing

Timetable for success

1 JULY 2017 – 30 JUNE 2019
24 MONTHS

PLATFORMS FOR GROWTH

6. Employment growth area infrastructure plans
7. GSC review of the region's urban renewal plans
12. Champions to deliver jobs growth
15. Economic white paper on airport
19. Audit of Western Sydney infrastructure
23. M5 Cashback Scheme to seed fund Western Sydney Orbital Rail (WSOR)
24. Investigation of value-sharing scheme for WSOR
26. Residential densification around new transport corridors
28. Western Sydney trade desk
29. Three multicultural micro business support centres
30. Western Sydney Innovation Corridor in *A Plan for Growing Sydney*
38. Open database platforms to support smarter cities
39. Urban Growth NSW to develop policy for creating start-up precincts

CREATING JOBS

46. Western Sydney HEP Advisory Group
48. Western Sydney HEP Growth Plan submitted to NSW Government
54. Co-funding of innovations identified by the Innovation Hub
55. Five HEP project groups
57. Establishment of WSML
63. WSML as a peak industry voice for manufacturing services in Sydney
64. Western Sydney Agriculture and Food Production initiatives
67. Urban farming programs within Western Sydney Parklands
69. Urban gardens in town centres and high-rise residential developments
71. Expressions of Interest for new tourism facilities on public leases
72. Tourism, hospitality and events education cluster
73. Five-year tourism and hospitality scholarships for school leavers
74. Map and register of Western Sydney's innovation ecosystem

76. Western Sydney 'innovation brokers' to commercialise concept briefs
77. Two new incubators
78. GSC to consider new land use types that encourage innovation
79. Identification of local businesses with potential to grow
80. \$25 million over five years for 100 micro infrastructure projects
81. Design and delivery of new local infrastructure ideas
84. Private sector use of reticulated water on construction sites
86. Water and environment cluster around Parramatta and Camellia

CONNECTING JOBS

89. Long-term Western Sydney jobs and skills forecasts
97. A Western Sydney Airport skills program
101. Business ambassadors in high schools located in low socio-economic areas
102. Professional service businesses to provide ambassadors at local high schools
103. Professional development training for school-to-work brokers
106. 50 new social investors and entrepreneurs
108. Knowledge Economy Index for Western Sydney
109. Regional action plan to address disadvantage
110. Support for young entrepreneurs
111. New programs for people made unemployed due to industry restructuring
112. Over-55 professional skills network
114. Greater access to public school facilities out of school hours
115. TAFE programs to assist degree-qualified students
117. Improved public transport for commuters
119. Women's advocacy organisation
122. Science, Technology, Engineering, Maths (STEM) development program for Year 5 to Year 9
123. STEM competition with local businesses
129. New arts and cultural spaces
130. Australia Council funding for art spaces
133. Cultural arts infrastructure funding

1 JULY 2019 – 3 DECEMBER 2020
18 MONTHS

PLATFORMS FOR GROWTH

- 9. Adoption of popularly elected mayoral models
- 10. Removal of rate capping
- 17. 40-year infrastructure vision for the region
- 18. 3D online tool for mapping Western Sydney
- 20. Greater market participation in infrastructure delivery
- 25. Eastern Creek Intermodal
- 34. Public ideas on innovations the Corridor could offer

CREATING JOBS

- 49. Western Sydney HEPs recognised as strategic centres
- 56. HEP worker opportunities
- 65. Western Sydney Airport planning for agribusiness supply chains
- 68. Agri-education plan for NSW schools
- 85. New suburbs that are 100% sustainable
- 87. Green action plans to improve the amenity of urban areas

CONNECTING JOBS

- 98. Financial planning centre of excellence
- 99. Consolidation of Sydney TAFEs
- 118. 'No cost' education, counselling and employment programs
- 120. Online directory of education, employment and volunteer opportunities
- 121. Project learning centres
- 124. 5,000 STEM tertiary scholarships
- 125. Australia's first STEM school
- 126. Science and engineering education campuses
- 128. Linked NEW housing and employment opportunities for disadvantaged communities
- 131. Relocation of SBS to Western Sydney
- 132. New performing arts centres

The implementation plan

There's no silver bullet to transform Western Sydney. Success will come when stakeholders work together with passion and persistence over a long period of time according to a great plan.

Designing Western Sydney isn't just a new blueprint with a lofty long-sighted jobs target. It includes an implementation plan for the next five years.

Importantly, to help ensure the blueprint's recommendations are implemented, *Designing Western Sydney* has the support of the NSW Government and key stakeholders in the region, along with a governance structure that is already in place.

Chart 25: Designing Western Sydney governance model



Government partnership

Designing Western Sydney provides a way for the NSW Government to deliver its objective of jobs growth in Western Sydney.

Finalisation of the blueprint's strategies and recommendations occurred through a consultation process with a number of senior state government agencies and departments. This process was used to test strategies against existing government policies for Western Sydney, along with introducing new ideas and issues to the government that were identified throughout the consultative process.

The blueprint will support the delivery of the NSW Government's stated jobs objectives for Western Sydney, namely "delivering strong investment and jobs growth in Western Sydney".²⁴ As such, it makes sense that implementation of the blueprint becomes a new partnership between Western Sydney and the NSW Government.

This new partnership will include:

- Adopting the target of creating 200,000 great new jobs in Western Sydney by 2020
- Providing a response to the blueprint
- Representation on the steering committee
- Signing the blueprint's charter
- Maintaining a whole-of-government dialogue with Western Sydney in relation to job creation
- Contributing to and receiving annual reports on the delivery of the new jobs target
- Deloitte to work with the NSW Government to agree the governance approach that will align *Designing Western Sydney* with government growth plans for the region.

²⁴ NSW Department of Planning & Environment, A Plan for Growing Sydney 2014.

The steering committee

Implementing the blueprint will require a diverse regional leadership team to oversee the process and to continue the dialogue with the NSW Government.

Development of this blueprint was guided by a steering committee. Deloitte chaired and provided support to this inaugural committee.

Over the next five years, Deloitte will continue this support. The size and diversity of the inaugural steering committee will be assessed following the blueprint's launch. The roles of the steering committee will be to:

- Provide high-level advice and direction on the implementation of the blueprint
- Advocate for action and resolve high-level issues related to implementation
- Attend steering committee meetings and work with partners to create jobs in Western Sydney.

The steering committee will include representation reflecting the regions diversity and connectivity with the rest of Australia, including aspiring to achieve a 50/50 gender mix.

Twenty-five champions

Champions will help navigate the tricky path to implementation.

Each strategy will have a public champion who will work with a variety of stakeholders to implement the relevant key recommendations, and provide expert advice on the strategy.

All champions will be supported by Deloitte staff, who will help facilitate and broker the actions and outcomes needed to implement the recommendations.

A Western Sydney Jobs Charter

Soft Power is the ability to attract and co-opt rather than coerce.

More than 400 individual stakeholders from a wide range of public and private organisations helped create the blueprint, but many more will be involved in its implementation. To engage this many stakeholders won't be easy. One of the concepts discussed in the process of creating the blueprint was that of 'Soft Power', an approach that has been used successfully in the past. For example, when organised, Western Sydney's leaders and communities have been effective in driving change and attracting public and private investment.

To effectively harness the Soft Power of Western Sydney in implementing the blueprint, a Western Sydney Jobs Charter has been created that symbolises the aspiration of the region to create 200,000 great new jobs.

All those involved in the blueprint's creation will be invited to sign the charter.

Annual reporting and accountability

The steering committee will produce annual reports on the progress of the blueprint's implementation. One of the first tasks of the new steering committee will be to design an accountability framework to measure progress.

The annual report will include reporting on each of the blueprint's 25 strategies and 133 recommendations. Ultimately, it will be a scorecard comparing actual results against the target of creating 200,000 great new jobs by 2020.

The first annual report will be released 12 months after the launch of the blueprint.

The transformation has already begun

One of the advantages of *Designing Western Sydney's* extensive consultative process is the opportunity for stakeholders with the same goals to meet and exchange ideas. In at least two cases, this led to action even before the blueprint's launch. These add to the other major Western Sydney initiatives that governments and other organisations have already started.

Health and Education Precincts Growth Advisory Group

Western Sydney's Health and Education Precincts (HEPs) emerged as a key opportunity to grow jobs and improve the delivery of health and education services in the region. To exploit the many economic and social development opportunities within the region's HEPs, *Designing Western Sydney* launched a Growth Advisory Group.

The group comprises senior leaders and experts in the sector who have taken responsibility for implementing the recommendations in Strategy 11 (see page 72). Deloitte, in partnership with other regional organisations, will provide ongoing secretariat support to the group, including convening at least three HEP innovation and development forums each year until 2020.

Manufacturing Lighthouse

In partnership with Deloitte, a group of Western Sydney manufacturing service providers have come together to consider how the future of manufacturing is supported in the region.

This group is developing an entity called Western Sydney Manufacturing Lighthouse (WSML) that will become a central point of connection for manufacturing support service providers – with the aim of helping companies in the region make the transition to becoming advanced manufacturers (see page 73).

Deloitte will continue to provide direct support to the WSML over the next five years to help ensure the Lighthouse achieves its mandate.

Skills Barometer

Skills Barometer: Building a skilled workforce for Greater Western Sydney is a comprehensive audit of the region's skills needs. A joint project between TAFE NSW Western Sydney Institute and Western Sydney Business Connection, the 2015 edition has been published, providing a valuable resource to help guide policies and programs to up-skill the region's workforce.

Western Sydney Orbital Rail corridor

While *Designing Western Sydney* recommends that funding for and work on the WSOR be given a higher priority (see page 64), the state government has already identified its corridor – a big step forward in establishing this vital link to help re-orientate and complete Sydney's rail system.

Western Sydney Airport

The government has begun work on a \$3.6 billion program to upgrade road infrastructure to support and provide vital links to Western Sydney Airport. While this is an important start, this blueprint has made a number of recommendations that would optimise the economic benefits to the region from the new airport (see page 62). With these measures, the new airport could transform the region through greater access to global markets, improving liveability, increasing business activity and creating jobs in the region.

"Shaping Future Cities – Designing Western Sydney was a 12 month process to get us to the starting line. The real work starts now to create 200,000 great new jobs that will deliver growth and prosperity for all of Sydney."

Danny Rezek, Office Managing Partner,
Deloitte Western Sydney

List of participating organisations

Absolute Tiling Solutions	Blackmores
Accommodation Association of Australia	Blacktown City Council
Actron Air	Blacktown Workers Club
Advanced Manufacturing Growth Centre	Blue Mountains City Council
Affordable Community Housing	Bluglass
Amalgamated Holdings	Boral Cement
Amber Group Australia	Brickworks
Anglicare Australia Inc	Bridgestone Earthmover Tyres
ANZ Bank	Briggs & Stratton Australia
Apex Strata	BSA
Arab Bank Australia	Business Events Sydney
Archer Capital	CA (Pacific)
Arts and Sport	Camden Council
Auburn Council	Campbelltown Arts Centre
Ausfeng Group	Campbelltown City Council
Ausindustry	Canberra Airport
Australian Capital Land	Capral
Australian Foundation For Disability	Casuala Powerhouse Arts Centre
Australian Hearing	Cater Care Australia Operations
Australian Labor Party	Catholic Education Office Diocese of Parramatta
Australian National Audit Office	CBRE
Australian Nuclear Science and Technology Organisation	Celestino
Australian Taxation Office	Centre for Western Sydney
Australian Tourism Solutions	Champion Legal
Baiada Group	Children's Medical Research Institute
Bank of Baroda	CMC Australia
Bankstown City Council	Cochlear
Banna Property	Coleman & Greig Services
Barden Produce	Colliers International (NSW)
Baxter Healthcare	Comfortdelgro Cabcharge
Baycorp (Aust)	Commercial Industrial Contractors (NSW)
Beaumont Strata Management	Committee for Economic Development of Australia
Beijing Capital Land	Committee for Sydney
Billbergia Group	Commonwealth Bank of Australia
Biotronik Australia	Compuware Asia-Pacific

List of participating organisations

Consult Australia
Conti Property
Cordina Chicken Farms
Crane Australia
Crown Equipment
CSIRO
Cumberland Business Chamber
Daikin Australia
Deloitte
Department of Regional Australia
Destination NSW
Dick Smith Holdings
Dyldam Developments
Eden Brae Homes
Elderton
Elizabeth Macarthur Agricultural Institute
Evolve Housing
Executive Strata Limited
F Pirovic & Sons
Fairfax Lawyers Limited
Fairfield City Council
Fantastic Holdings Limited
Featherdale Wildlife Park
First State Superannuation Scheme
Food Innovation Australia
Football Federation Australia Limited
Forest Coach Lines
Forever Living Products Australia Limited
Foti International Fireworks
Freyssinet Australia
Fuji Xerox Australia Limited
Gadens Lawyers Sydney
Gelatissimo Limited
Government Property NSW
Grace Worldwide (Australia)
Greater Sydney Tourism
Green's Foods Holdings Limited
GSF Australia Limited
Gunnebo Australia
Harness Racing New South Wales
Hawkesbury Harvest
Healthcare Real Estate
Healthshare (NSW)
Hills Hawkesbury and Riverlands Tourism Inc
Hindmarsh Development Australia Limited
Hitachi Australia Limited
Holroyd City Council
Hunter Douglas Limited
HWL Ebsworth Lawyers
Hyundai Motor Company Australia Limited
Industry Capability Network (NSW)
Infrastructure NSW
Ingham Institute
Ingleburn Bus Services
Innovative Manufacturing CRC
Inova Pharmaceuticals (Australia) Limited
Interface Aust Limited
International Property Group
Jem Computer Systems
Johnson & Johnson Medical
Kalanda Enterprises
Kennards Self Storage Limited
Key Strata Management
Kids Research Institute
Knight Frank
Komatsu Australia
Konecranes
Lead Your Industry
Legal Point Limited
Lend Lease

List of participating organisations

Leppington Pastoral Co	NSW Department of Primary Industries
Lidis	NSW Department of Trade & Investment
Lipa Pharmaceuticals	NSW Health Infrastructure
Liverpool City Council	NSW Health Pathology
Liverpool Hospital	NSW Roads and Maritime Services
Local Land Services	NSW Sport and Recreation
Maclarens Lawyers	One Strata Managers
Macquarie University	Parkroyal Parramatta
Manildra Group	Parkview Group (Australia)
Manufacturing Skills Australia	Parramatta City Council
Many Rivers	Parramatta Mission
Master Communications & Electronics	Penrith Business Alliance
Matthews Folbigg Limited	Penrith City Council
Medical Technical Association of Australia	Penrith Panthers
Menzies Research Institute	Pentair Water Solutions
Millers Turf	Pepe's Ducks
Moorebank Intermodal Company	Pfizer Australia
Mowbray Park Farm	Prouds Jewellers
Museum of Contemporary Art	Prudential Investment Company of Australia
National Architecture	Qantas Airways
National Australia Bank	Regional Development Australia, Sydney
NBN Co	Rema Tip Top Asia Pacific
Nepean Blue Mountains Local Health District	Revlon Australia
Networked Infrastructure	Riverside Parracity
New South Wales Aboriginal Land Council	Riverside Theatres
New South Wales Strata Management	Roland DG Australia
Nick Scali	Ronald McDonald House
Nikon Australia	Rooty Hill RSL Club
Novotel Sydney Rooty Hill	Russells Law
NSW Business Chamber	Sanity Entertainment
NSW Department of Education & Training	Sarina Russo
NSW Department of Family and Community Services	Scenic World, Blue Mountains
NSW Department of Finance, Services & Innovation	Scentre Group
NSW Department of Industry	Shine Lawyers
NSW Department of Premier & Cabinet	Shoalhaven City Council

List of participating organisations

Shiro Australia
SME Gateway
Smeg Australia
Snap-On Tools (Australia)
South Western Sydney Local Health District
Southern Strength Manufacturing Network
St.George Bank
Strata Plus
Strathfield Partners
Sun Masamune Sake
Suncorp Group
Supreme Reader Learning
Sydney Aerospace and Defence Interest Group
Sydney Cardiology Group
Sydney Hills Business Chamber
Sydney International Regatta Centre
Sydney Markets
Sydney Night Patrol & Inquiry Co
Sydney Olympic Park Authority
Sydney Olympic Park Business Association
Sydney Southwest Private Hospital
Sydney Water Corporation
TAFE South Western Sydney Institute
TAFE Sydney Institute
TAFE Western Sydney Institute
Tailored Packaging
Telstra
The Association of Independent Schools
The Children's Hospital at Westmead
The Committee for Sydney Incorporated
The GPT Group
The Hills Shire Council
The Sydney Children's Hospitals Network
The Taylor Street Consultancy
The University of Sydney
The Warren Centre for Advanced Engineering
Think Education
Tourism & Transport Forum
Tourism Accomodation Australia
Tourism Transport Forum TTF
Transport for NSW
Turf NSW
UGL
United Technologies Corporation
University of New South Wales
University of Sydney
University of Technology Sydney
UNSW Australia
Urban Taskforce Australia
Urbangrowth NSW
VegMasters
Vic's Premium Quality Meat
Walker Corporation
Wanacka Orchard
Wesley Mission
Western Sydney Business Connection
Western Sydney Future Advanced Manufacturing
Western Sydney Leadership Dialogue
Western Sydney Local Health District
Western Sydney Parklands Trust
Western Sydney Regional Organisation Of Councils
Western Sydney University
Western Sydney Wanderers FC
Westmead IVF
Westmead Children's Hospital
Westmead Medical Research Foundation
Westmead Millenium Institute for Medical Research
Westmead Private Hospital
William Roberts Lawyers
Wollondilly Shire Council
Woolworths

Recommendation appendix

1. Five Priority Employment Growth Areas
2. The Greater Sydney Commission role
3. A Western Sydney Development Authority (WSDA)
4. The WSDA to link Greater Sydney Commission to jobs
5. GSC located in Western Sydney – adopts 200,000 jobs target
6. Employment growth area infrastructure plans
7. GSC review of the region’s urban renewal plans
8. GSC report on progressing the jobs target
9. Adoption of popularly elected mayoral models
10. Removal of rate capping
11. Devolvement of front-line community infrastructure to local government
12. Champions to deliver jobs growth
13. A curfew-free airport connected by rail to Sydney, Parramatta and Liverpool
14. A Sydney Orbital Train network
15. Economic white paper on airport
16. Western Sydney Airport Export Assistance Taskforce and Investment Attraction Unit
17. A 40-year infrastructure vision for the region
18. 3D online tool for mapping Western Sydney
19. Audit of Western Sydney infrastructure
20. Greater market participation in infrastructure delivery
21. 15-minute express train between Parramatta and Sydney CBD, 30-minute express to other regional city centres
22. Prioritisation of the WSOR
23. M5 Cashback Scheme to seed fund WSOR
24. Investigation of value-sharing scheme for WSOR
25. Eastern Creek Intermodal
26. Residential densification around new transport corridors
27. Strategic plan to promote export opportunities from our multicultural diaspora
28. Western Sydney Trade Desk
29. Three multicultural micro business support centres
30. A Western Sydney Innovation Corridor in *A Plan for Growing Sydney*
31. Resourcing a Western Sydney ‘digital ecosystem’
32. Marketing the Innovation Corridor
33. More innovation ‘shopfronts’
34. Public ideas on innovations the Corridor could offer
35. A case for investment for key assets within the Corridor
36. Urban Growth NSW to work with local Councils to deliver urban renewal
37. Urban Growth NSW to adopt 10,000 jobs target to be achieved by 2021
38. Open database platforms to support smarter cities
39. Urban Growth NSW to develop policy for creating start-up precincts
40. Free Wi-Fi linked to innovation
41. Walkability action plans
42. GSC to incorporate walkability planning in sub-regional planning
43. Autonomous vehicle test zone in Western Sydney
44. Cooperative campaigns to promote business support services
45. One-third of the Jobs for NSW Fund allocated to Western Sydney
46. The Western Sydney HEP Advisory Group

Recommendation appendix

47. Senior public representatives to participate in HEP Advisory Group
48. Western Sydney HEP Growth Plan submitted to NSW Government
49. Western Sydney HEPs recognised as strategic centres
50. Western Sydney HEPs infrastructure needs assessment
51. Testing new models of health delivery
52. Western Sydney Health and Education Innovation Hub
53. Health innovation hub idea pilot projects
54. Co-funding of innovations identified by the Innovation Hub
55. Five HEP project groups
56. HEP worker opportunities
57. Establishment of a Western Sydney Manufacturing Lighthouse (WSML)
58. WSML facilitation of market-led joint opportunities
59. An Advanced Manufacturing Knowledge Hub in Western Sydney
60. CSIRO manufacturing research facility in Western Sydney
61. Australian and New Zealand Standard Industrial Classification for advanced manufacturing
62. Top 100 manufacturers to participate in WSML
63. WSML as a peak industry voice for manufacturing in Sydney
64. Western Sydney Agriculture and Food Production initiatives
65. Western Sydney Airport planning for agribusiness supply chains
66. Market-based Agricultural Enterprise Credit scheme
67. Urban farming programs within Western Sydney Parklands
68. An agri-education plan for NSW schools
69. Urban gardens in town centres and high-rise residential developments
70. Western Sydney Visitor Economy Strategy
71. Expressions of Interest for new tourism facilities on public leases
72. Tourism, hospitality and events education cluster
73. Five-year tourism and hospitality scholarships for school leavers
74. Map and register of Western Sydney's innovation ecosystem
75. New Innovation Platforms to develop innovation concept briefs
76. Western Sydney 'innovation brokers' to commercialise concept briefs
77. Two new incubators
78. GSC to consider new land use types that encourage innovation
79. Identification of local businesses with potential to grow
80. \$25 million over five years for 100 micro infrastructure projects
81. Design and delivery of new local infrastructure ideas
82. Greater reticulated water usage
83. Expansion of water supply network for reticulated systems
84. Private sector use of reticulated water on construction sites
85. New suburbs that are 100% sustainable
86. Water and environment cluster around Parramatta and Camellia

Recommendation appendix

87. Green action plans to improve the amenity of urban areas
88. *Skills Barometer 2015* distributed to high schools
89. Long-term Western Sydney jobs and skills forecasts
90. A Western Sydney Skills Strategy
91. Business census to be conducted every two years
92. Career information in languages reflective of Western Sydney's multicultural diversity
93. Skills exchange program on major infrastructure projects
94. Skills exchanges a requirement for major government procurements
95. Large developers and infrastructure providers to enter into a Western Sydney Skills Exchange Compact
96. A transport and logistics training centre of excellence
97. A Western Sydney Airport skills program
98. Financial planning centre of excellence
99. Consolidation of Sydney TAFEs
100. Audit of school-to-work transition programs
101. Business ambassadors in high schools located in low socio-economic areas
102. Professional service businesses to provide ambassadors at local high schools
103. Professional development training for school-to-work brokers
104. Training for Western Sydney school career advisors
105. School-to-work transition programs
106. 50 new social investors and entrepreneurs
107. Western Sydney Careers Expo and Jobs Summit
108. Knowledge Economy Index for Western Sydney
109. Regional action plan to address disadvantage
110. Support for young entrepreneurs
111. New programs for those unemployed due to industry restructuring
112. An over-55 professional skills network
113. Business involvement in not-for-profits and community groups
114. Greater access to public school facilities out of school hours
115. TAFE programs to assist degree-qualified students
116. A Living and Working in Western Sydney Guide
117. Improved public transport for commuters
118. 'No cost' education, counselling and employment programs
119. Women's advocacy organisation
120. Online directory of education, employment and volunteer opportunities
121. Project learning centres
122. A STEM development program for Year 5 to Year 9
123. A STEM competition with local businesses
124. 5,000 STEM tertiary scholarships
125. Australia's first STEM school
126. Science and engineering education campuses
127. Public lands for mixed social and affordable housing
128. Linked NEW housing and employment opportunities for disadvantaged communities
129. New arts and cultural spaces
130. Australia Council funding for art spaces
131. Relocation of SBS to Western Sydney
132. New performing arts centres
133. Cultural arts infrastructure funding



Warragamba dam: a major post war infrastructure project that gave birth to multiculturalism in Western Sydney.

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Cover image: Liverpool city centre

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